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PROJECT FEASIBILITY AND IMPACT ANALYSIS VISITOR CENTER: YAQUINA HEAD OUTSTANDING NATURAL AREA

prepared for the

U.S. Department of the Interior
Bureau of Land Management

Dean Runyan Associates
Portland OR

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2 March 1990

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U.S. Department of the Interior
Bureau of Land Management
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I. INTRODUCTION

Project Objectives

The overall objective of this project is to prepare information which facilitates planning for and developing a visitor facility at Yaquina Head. Specific objectives are to:

- o profile visitors to Yaquina Head
- o forecast visitation to Yaquina Head and to a proposed visitor facility located on site
- o provide reference material for comparable attractions on the Central Coast
- o analyze economic impacts on the Central Coast which are associated with the Yaquina Head facility

The research was to be based to the extent possible on data gathered from a selection of comparable facilities on the Oregon coast, as specified by BLM staff. In addition the research was to draw on visitor profile data collected as part of the study conducted in 1989 by Dean Runyan Associates for the Oregon Tourism Division (Dean Runyan Associates, 1989).

Site Location and Characteristics

Yaquina Head is located approximately 3 miles north of the urban area of Newport, Oregon, immediately adjacent to U.S. Highway 101. The headland extends beyond the adjoining coastline approximately one-half mile. There is an operating lighthouse on the headland, with road access and limited parking. The site has been extensively quarried, producing major alterations in the terrain, primarily in the middle portion of the headland. A portion of this damage has been repaired as part of a site restoration process. The headland includes a high quality tidal area, one of three designated marine gardens in Oregon. There is trail access to this tidal area, as well at to other locations on the headland.

Visitation during 1988 was counted as 77,601 vehicles, which BLM staff converted to visitation of 271,604 using a factor of 3.5 persons per vehicle. Staff estimate that 1989 attendance was somewhat over this amount, although problems with vehicle counters eliminated data for certain periods. For purposes of this study the more reliable 1988 figure is used. Some data on visitors to the site are available from a survey conducted during the summer of 1985; certain of these findings are reviewed in Chapter 3.

Development and Interpretation Plan

Although an interpretation plan has not been completed for the site as of this report, preliminary development concepts have been outlined, and include:

- o increased road access and parking, with the latter located primarily in the upper quarry area

- repair (to the extent feasible) of the damage from quarry operations
- construction of a visitor facility near the upper quarry site
- additional trails, interpretative materials and other dispersed development
- additional access to and interpretation of the existing tidal area; possible use controls to prevent and/or mitigate damage
- potential development of an additional tidal area at the location of the lower quarry site, constructed by additional dredging and connection to the sea.

Interpretation of the site would focus on natural features, in particular the tidal area, wildlife, and the immediate offshore area, including migrating whales. The emphasis would be on education rather than on recreation. The lighthouse also would be a prominent feature. Food service, and even picnic facilities, would be limited or absent. Physical development would be to a scale which is appropriate to the natural quality of the site.

BLM staff are also very interested in assuring that Yaquina Head development proceed in concert with development of other complementary attractions in the area, including in particular the Oregon Coast Aquarium, the Hatfield Marine Science Center, and one or more of the nearby state parks. Interpretive programs which could include these facilities include a wide variety of educational sessions for children, families and the elderly, scientific meetings and research, sightseeing by coastal travelers, and possibly use of the facilities for certain community functions which require meeting space.

Report Contents

After this introduction chapter, Chapter 2 describes historic visitation patterns on the Oregon Coast, followed by a profile of Central Coast visitors in Chapter 3. Chapter 4 describes and analyzes the comparable facilities studied as part of this project.

Projections of visitor volume for Yaquina Head development scenarios appear in Chapter 5, plus separate projections of attendance at a visitor facility if an admission fee is charged. Chapter 6 describes the economic impacts associated with further development at Yaquina Head. Finally, Chapter 7 discusses the study's primary findings and presents a set of recommendations.

2. VISITATION TRENDS

This chapter examines visitor trends at Yaquina Head and at a number of comparable visitor attractions. This information is used to provide a snapshot of travel activity in the central Oregon coast region, and at comparable visitor destinations. Looking at comparables is particularly instructive when the chosen sites have the type of facilities, such as interpretive centers, that are similar to the proposed development at Yaquina Head.

The trends discussed in this section focus on annual attendance in order to establish growth rates, while monthly visitation is shown to indicate seasonality. Room tax receipts and visitation for attractions in the Newport area illustrate travel activity for the immediate coastal region.

Visitation at Comparable Facilities

The comparable attractions utilized in this analysis were specified by BLM staff and include facilities located on the Oregon Coast. Several of the facilities have an educational component, including exhibits housed in a museum or interpretive center. All comparables focus on marine or shoreline themes.

The Hatfield Marine Science Center has the largest visitation of all the comparables discussed in this report. See Table 2–1. With links to Oregon State University and a mission focused on educating the public, the center sponsors an array of special activities such as whalewatching, nature walks, and ongoing teacher education. In addition to those participating in these activities the center attracts most of its visitors to the ongoing aquarium exhibits and displays.

The HMSC serves as an important comparable for Yaquina Head because both attractions are located in the city of Newport and sited off of Oregon Coast Highway 101. These attractions are also complementary to one another with the HMSC an inland indoor facility providing displays of the marine environment, while the Yaquina headland offers access the actual tidepools and exposed shoreline environment. In fact, the HMSC currently sponsors whalewatching and tidepool outings to Yaquina Head.

The interpretive center at Cape Perpetua is a useful comparable because like the proposed Yaquina Head development, Cape Perpetua provides an interpretive center which is adjacent to the shoreline environment about which it provides information. In addition to ocean viewpoints, the Cape Perpetua center offers access to tidepools and a trail system on the Perpetua headland.

The Oregon Dunes National Recreation Area information center is located inland from the recreation area shoreline environment. The center provides interpretive information about the dunes but because of the size of the 47 mile NRA, visitors are likely to take self-directed tours of the area. Like Yaquina Head, both Cape Perpetua and the Dunes NRA visitors centers are managed by agencies of the federal government.

While they do not have indoor interpretive facilities, Devil's Punchbowl and Devil's Elbow state parks each have features similar to those at Yaquina Head. Devils Elbow provides access via trails to the Heceta Head lighthouse, one of the best known scenic sights on the Oregon Coast. Though this state park also offers a beach, picnic areas, and trail system, the lighthouse is probably the park's primary attraction and a feature in common with Yaquina.

Devil's Punchbowl state park is the access point to the Otter Rock marine gardens. The attendance at this site provides an indication of the popularity of marine gardens as an attraction. Marine gardens are one of the noteworthy natural features at Yaquina Head. Each of these state parks have annual visitation in excess of 300,000. See Table 2-1.

Two comparables are used which charge admission fees. The Columbia River Maritime museum is a private non-profit attraction which offers exhibits and education about river related maritime themes. In addition to the museum proper the facility also includes access to the retired lightship Columbia. Sea Lion Caves is a commercial facilities located on Highway 101 north of Florence.

Table 2-1
COMPARABLE ATTRACTIONS CHARACTERISTICS

Attraction	Location	Facility /Activity	Annual Attendance	Facility Operator
Hatfield Marine Science Center	Newport	Aquarium, marine science education	421,546	Oregon State Univ.
Cape Perpetua	Yachats	Interpretive center, tidepools, viewpoint	89,250	U.S. Forest Service
Oregon Dunes NRA	Reedsport	Information center	21,786	U.S. Forest Service
Devil's Punch Bowl State Park	Newport	Marine gardens, viewpoint	317,276	State Parks
Devil's Elbow State Park	Florence	Lighthouse, viewpoint	341,322	State Parks
Columbia River Maritime Museum	Astoria	Museum, maritime exhibits, lightship	92,576	Private Non-Profit

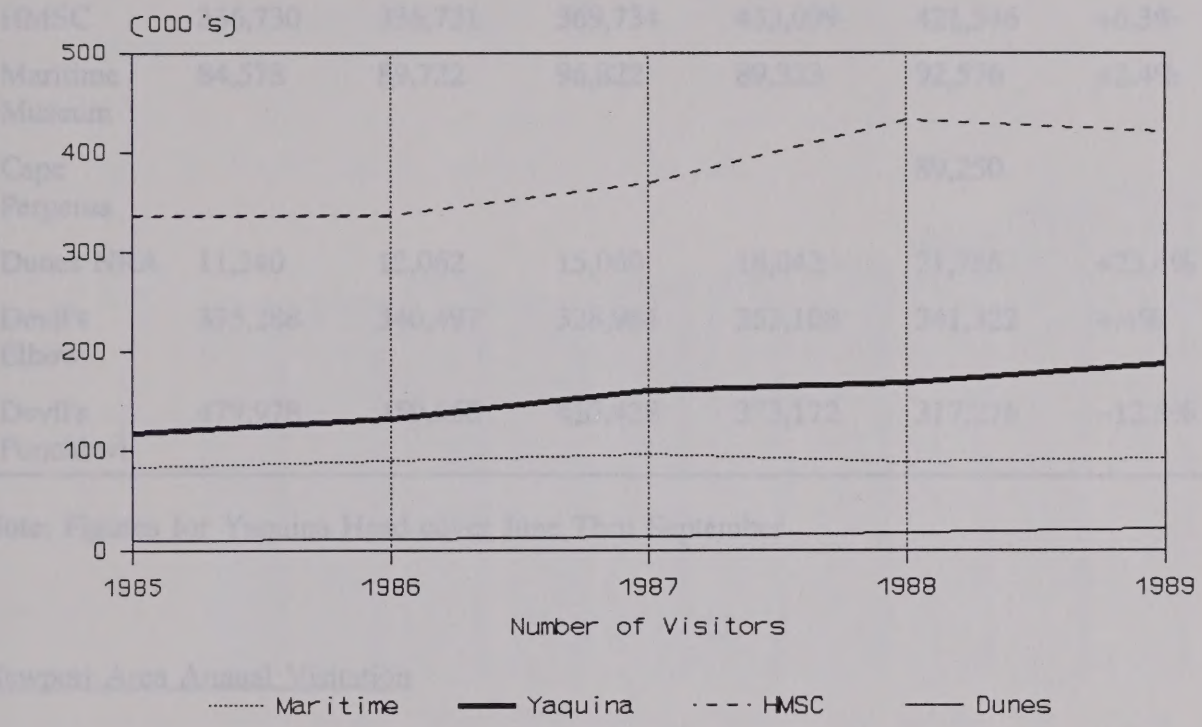
Annual Visitation at Comparable Attractions

Table 2-2 shows visitation trends for Yaquina Head and its comparables. During the past five years each attraction has experienced steady or growing visitation. It should be noted that Devil's Punchbowl shows visitation declines due to road construction and resultant changes in traffic counter positioning. Park officials indicate that the park has had consistent visitation since 1985, and has been at full capacity during the summer season.

Overall, these figures indicate continued growth for both undeveloped shoreline state parks and attractions with developed visitors centers or exhibit facilities. See also Figure 2-1. It is especially interesting to note visitation increases at the undeveloped Yaquina Head site. Note that due to current road construction and attendance history data, Yaquina Head trends are for the peak visitation months of June through September rather than for the full calendar year. Nevertheless, the site shows one of the most significant average annual growth rates.

Figure 2-1

COMPARABLE VISITATION TRENDS



Yaquina Head: June Thru Sept

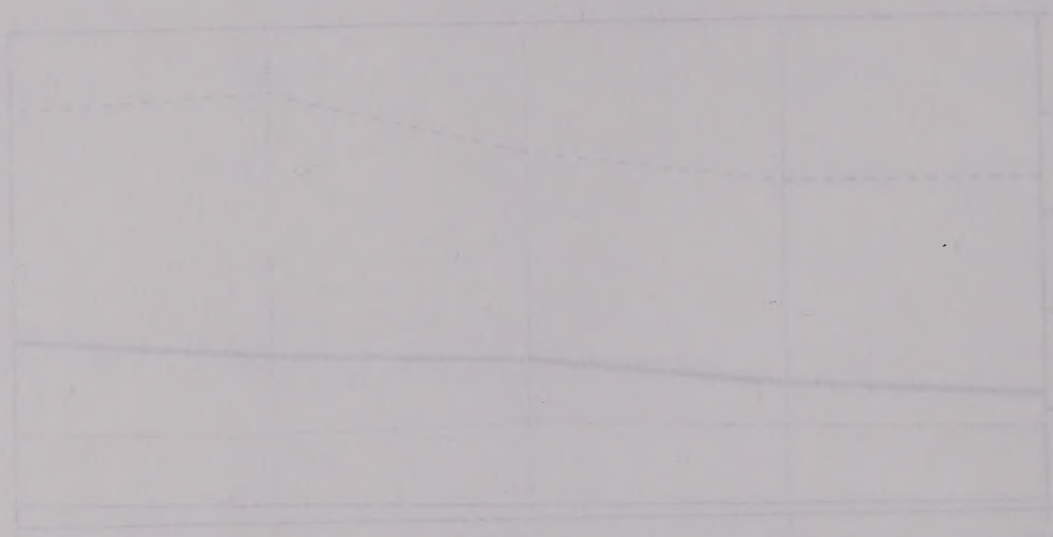


Table 2-2
ANNUAL VISITATION FOR REGIONAL ATTRACTIONS

Attractn	1985	1986	1987	1988	1989	Annual Avg. % Change
Yaquina Head	118,538	132,514	135,583	141,925	164,374	+9.6%
HMSC	336,730	336,731	369,734	433,099	421,546	+6.3%
Maritime Museum	84,578	89,722	96,822	89,323	92,576	+2.4%
Cape Perpetua					89,250	
Dunes NRA	11,240	12,062	15,060	18,042	21,786	+23.4%
Devil's Elbow	335,288	340,497	328,984	353,108	341,322	+.4%
Devil's Punchbwl	479,978	459,550	415,428	373,172	317,276	-12.8%

Note: Figures for Yaquina Head cover June Thru September

Newport Area Annual Visitation

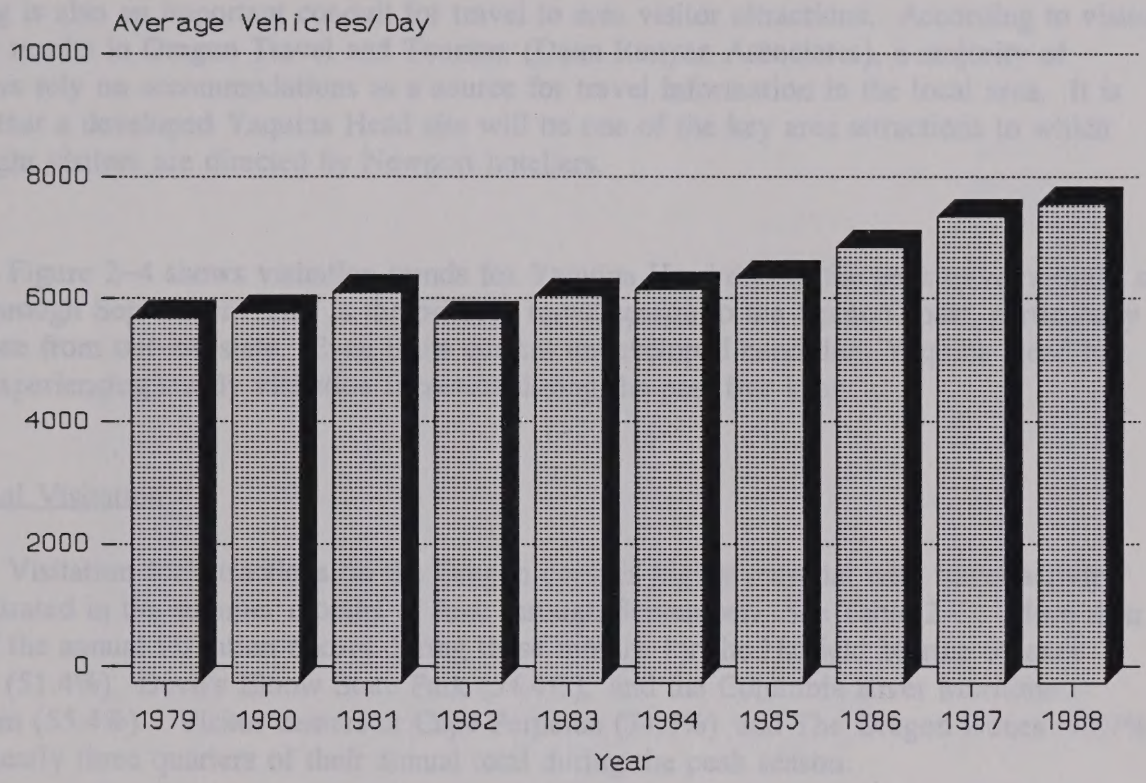
In addition to looking at visitation trends at Yaquina Head comparables, it is also instructive to examine travel activity in the immediate Yaquina Head/Newport area.

Figure 2-2 shows traffic counts for a ten year period at the Otter Rock automatic counting station on Highway 101 about five miles north of Yaquina head. Since the 1982/83 recession, average daily traffic at the counting site has increased from just over 6,000 cars per day to nearly 8,000 cars per day in 1988 (two way traffic).

These figures show that overall traveler activity on the 101 corridor in the vicinity of Yaquina Head is continuing to increase. Since the location of the Yaquina Head access road is immediately off of Highway 101, a developed and properly signed attraction will likely draw an increasing number of visitors who are traveling this route.

Figure 2-2

TRAFFIC COUNTS HWY 101 NORTH OF YAQUINA



Two-Way Traffic

While visitor auto traffic past Yaquina Head indicates an increasing audience for the site, lodging activity in the immediate Newport area provides additional information regarding the potential visitor market. Figure 2–3 shows room tax receipts for lodging facilities in the City of Newport. The growth trend in room tax receipts is likely due to several factors including increases in occupancy rates, room rates or a combination of both. In any case, these figures indicate that the demand for Newport as travel destination is increasing. More visitors are staying in the community and/or visitors are willing to pay more money in order to spend the night in Newport.

In addition to reflecting the market demand for the Newport area as a destination, lodging is also an important conduit for travel to area visitor attractions. According to visitor survey results in Oregon Travel and Tourism (Dean Runyan Associates), a majority of travelers rely on accommodations as a source for travel information in the local area. It is likely that a developed Yaquina Head site will be one of the key area attractions to which overnight visitors are directed by Newport hoteliers.

Figure 2–4 shows visitation trends for Yaquina Head during the peak travel months of June through September. This is the primary travel season to the Oregon coast, particularly for those from out–of–state. Even in its current undeveloped condition, Yaquina Head has been experiencing steady visitation increases during the past five years.

Seasonal Visitation

Visitation for attractions on the Oregon coast is highly seasonal with travel activity concentrated in the summer months of June through September. See Table 2–3. More than half of the annual visitation occurs during these months for the Hatfield Marine Science Center (51.4%), Devil's Elbow State Park (54.4%), and the Columbia River Maritime Museum (55.4%). Visitor centers at Cape Perpetua (74,5%) and The Oregon Dunes (70.7%) draw nearly three quarters of their annual total during the peak season.

Figure 2-3

OCCUPANCY TAX RECEIPTS, CITY OF NEWPORT

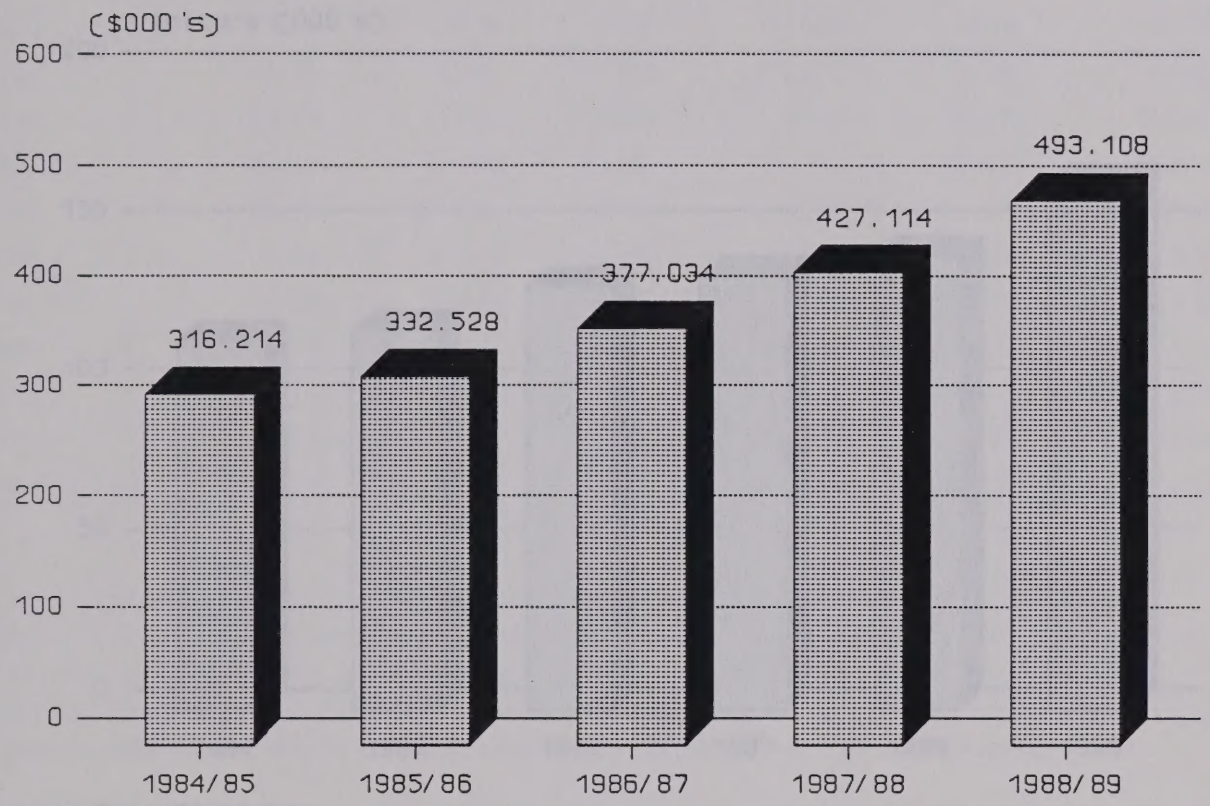
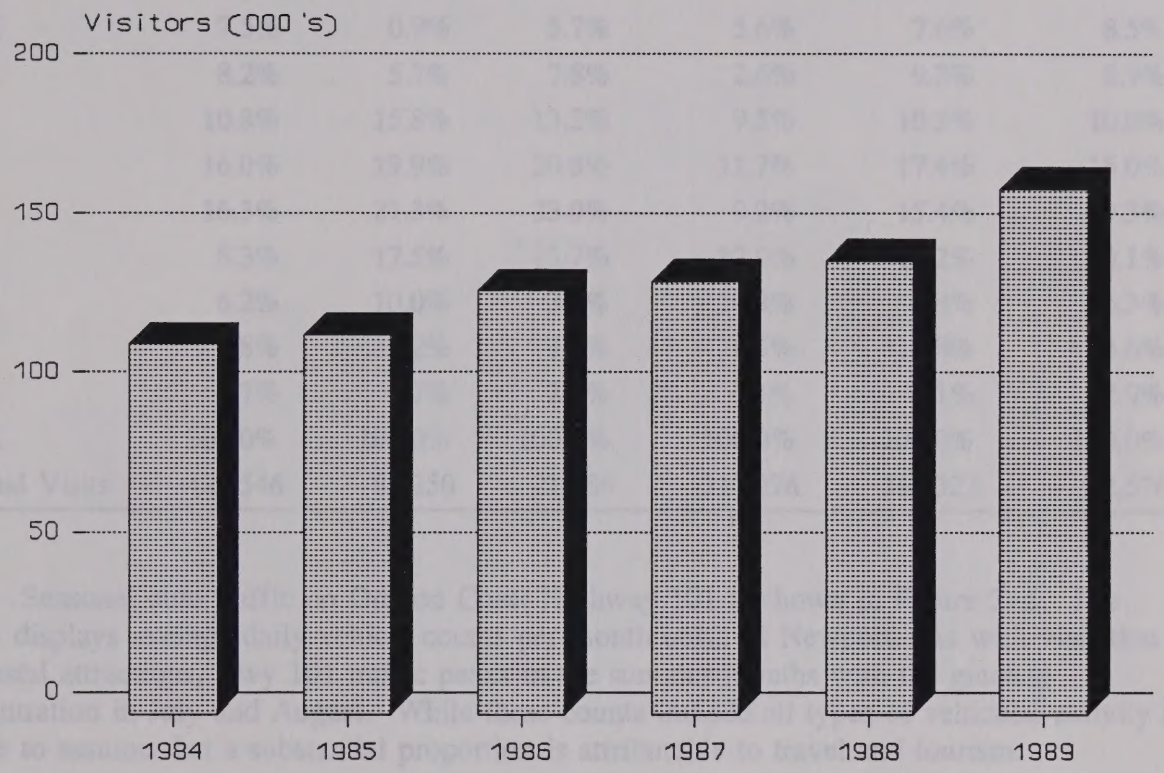


Figure 2-4

PEAK SEASON VISITATION YAQUINA HEAD



June Thru September

Table 2-3
DISTRIBUTION OF ANNUAL VISITATION
FOR YAQUINA HEAD COMPARABLES

Month	HMSC	Cape Perpetua	Dunes NRA	Devil's Punchbowl	Devil's Elbow	Maritime Museum
Jan	4.6%	1.7%	1.8%	6.7%	4.2%	3.3%
Feb	3.7%	1.3%	1.6%	5.8%	3.2%	4.6%
March	8.9%	2.0%	4.5%	11.0%	6.3%	6.5%
April	7.5%	0.9%	5.7%	5.6%	7.6%	8.5%
May	8.2%	5.7%	7.8%	2.6%	9.3%	8.9%
June	10.8%	15.8%	13.2%	9.5%	10.5%	10.0%
July	16.0%	19.9%	20.8%	11.7%	17.4%	16.0%
Aug	16.3%	21.3%	23.0%	9.2%	15.4%	19.3%
Sept	8.3%	17.5%	13.7%	12.0%	11.2%	10.1%
Oct	6.2%	10.0%	3.8%	10.3%	6.8%	6.3%
Nov	4.8%	2.2%	1.9%	8.5%	4.0%	3.6%
Dec	4.7%	1.7%	2.2%	7.1%	4.1%	2.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual Visits	421,546	89,250	21,786	317,276	341,322	92,576

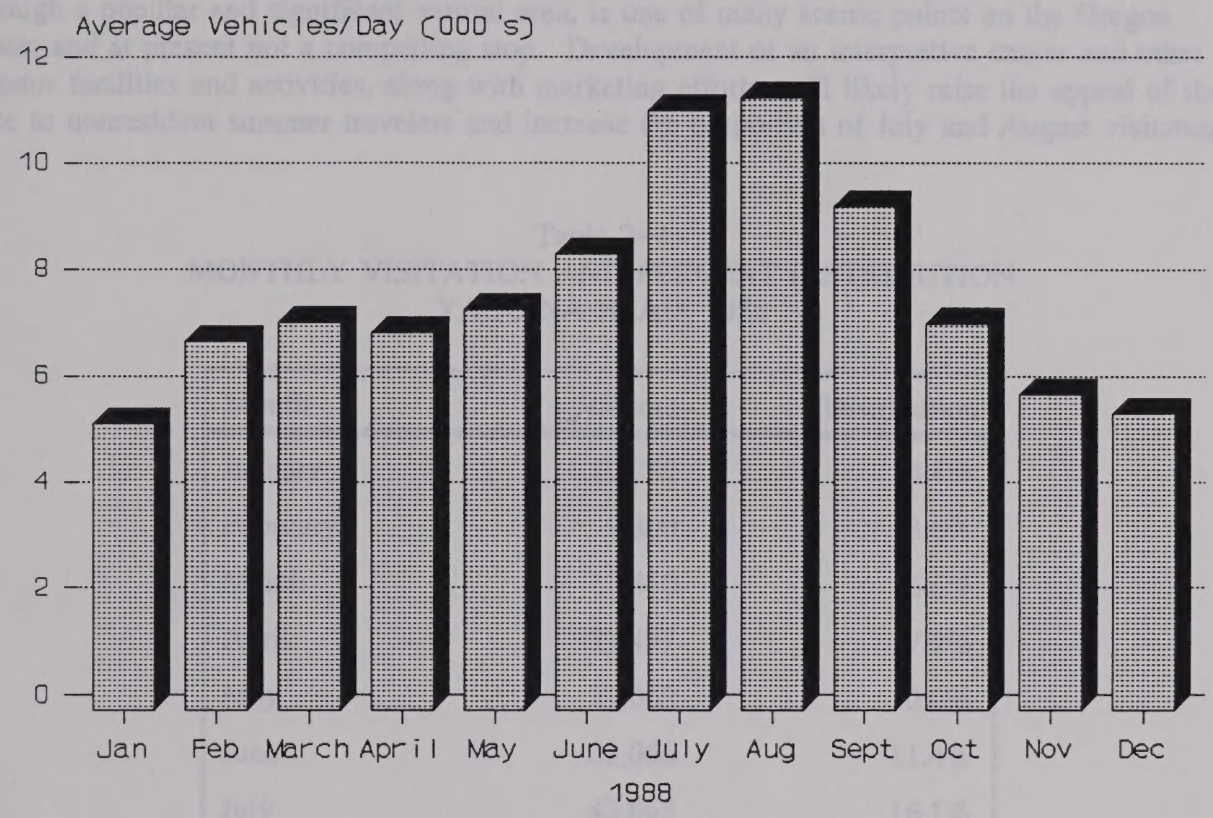
Seasonal auto traffic on Oregon Coast Highway 101 is shown in Figure 2-5. The figure displays average daily vehicle counts per month north of Newport. As with visitation at coastal attractions, Hwy 101 traffic peaks in the summer months with the greatest concentration in July and August. While these counts include all types of vehicular activity it is safe to assume that a substantial proportion is attributable to travel and tourism.

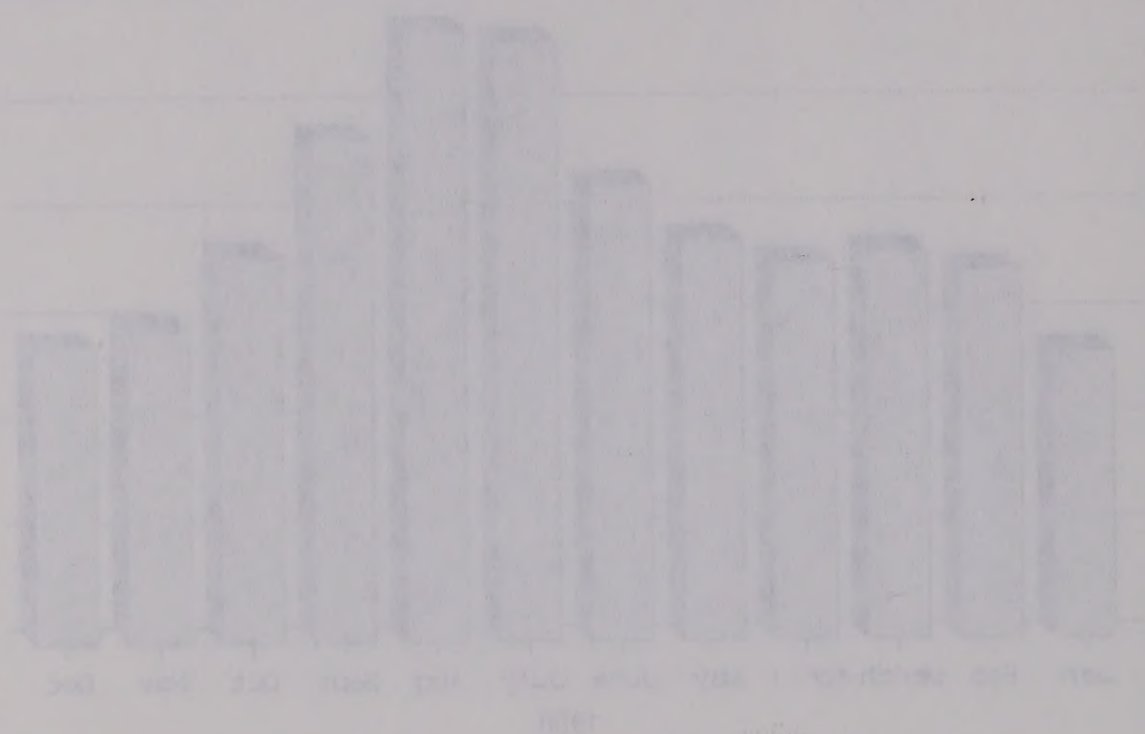
Seasonal indicators for Yaquina Head are shown in Table 2-4 and Figure 2-6. As with other coastal attractions, Yaquina Head currently generates over half (52.3%) of its annual visitation from June through September, with nearly a third (30.8%) in July and August alone. While a fully developed Yaquina Head attraction will generate increased visitor volume the site will continue to experience seasonal peaks.

Seasonal visitation at the Hatfield Marine Science Center can provide insight into the nature of seasonal peaks at a developed Yaquina Head. Figure 2-7 compares current visitation at Yaquina head and the HMSC. As indicated, Yaquina 'nests' under seasonal visitation at the HMSC during every month except three - March , July, and August.

Figure 2-5

MONTHLY TRAFFIC COUNTS HWY 101





March is the peak of California's Grey Whale northward migration, and as such is a time when the HMSC offers special whale watching programs. These programs increase visitation through the center beyond the normal seasonal attendance distribution shown at Yaquina Head. Given that the Yaquina headland is an ideal place for whale watching, a developed Yaquina Head interpretive center with its own whale watching programs will likely see an increase in its visitor distribution in March. Note also that a similar program during the Fall southerly migration might also increase visitation during the Fall 'shoulder' season.

July and August increases in visitor distribution at the HMSC are probably due to the interest that summer non-resident visitors show in the facility. The center is presently a unique coastal attraction, perhaps a 'must see' for out-of-state travelers. Yaquina Head, though a popular and significant natural area, is one of many scenic points on the Oregon coast and at present not a compelling stop. Development of an interpretive center and other visitor facilities and activities, along with marketing efforts, will likely raise the appeal of the site to nonresident summer travelers and increase the proportion of July and August visitation.

Table 2-4
MONTHLY VISITATION AND PERCENT DISTRIBUTION
YAQUINA HEAD, 1988

Month	Visitors	Distribution
January	12,250	4.4%
February	9,800	3.6%
March	17,850	6.6%
April	21,497	7.9%
May	27,062	10.0%
June	31,066	11.4%
July	43,663	16.1%
August	39,833	14.7%
September	27,363	10.1%
October	18,480	6.8%
November	11,963	4.4%
December	10,777	4.0%
Total	271,605	100.0%

Figure 2-6

MONTHLY TRAFFIC COUNTS YAQUINA HEAD

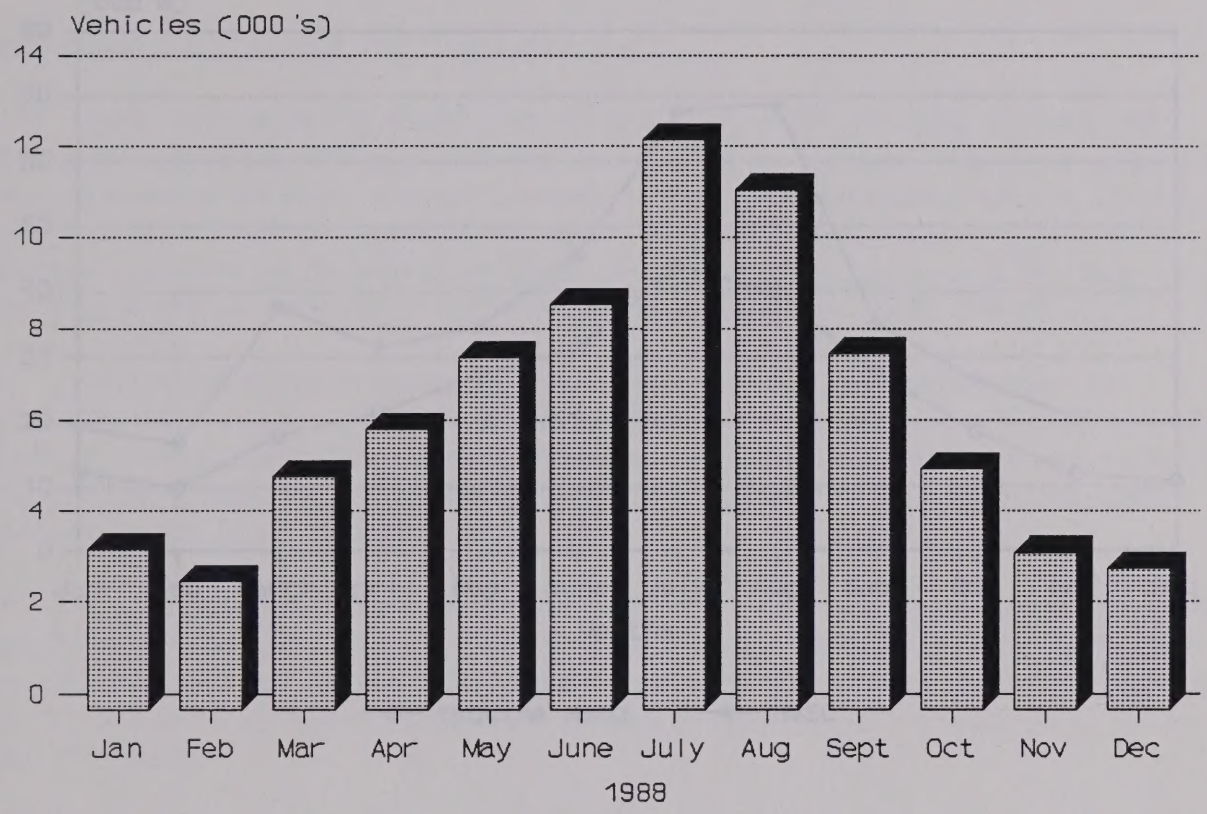
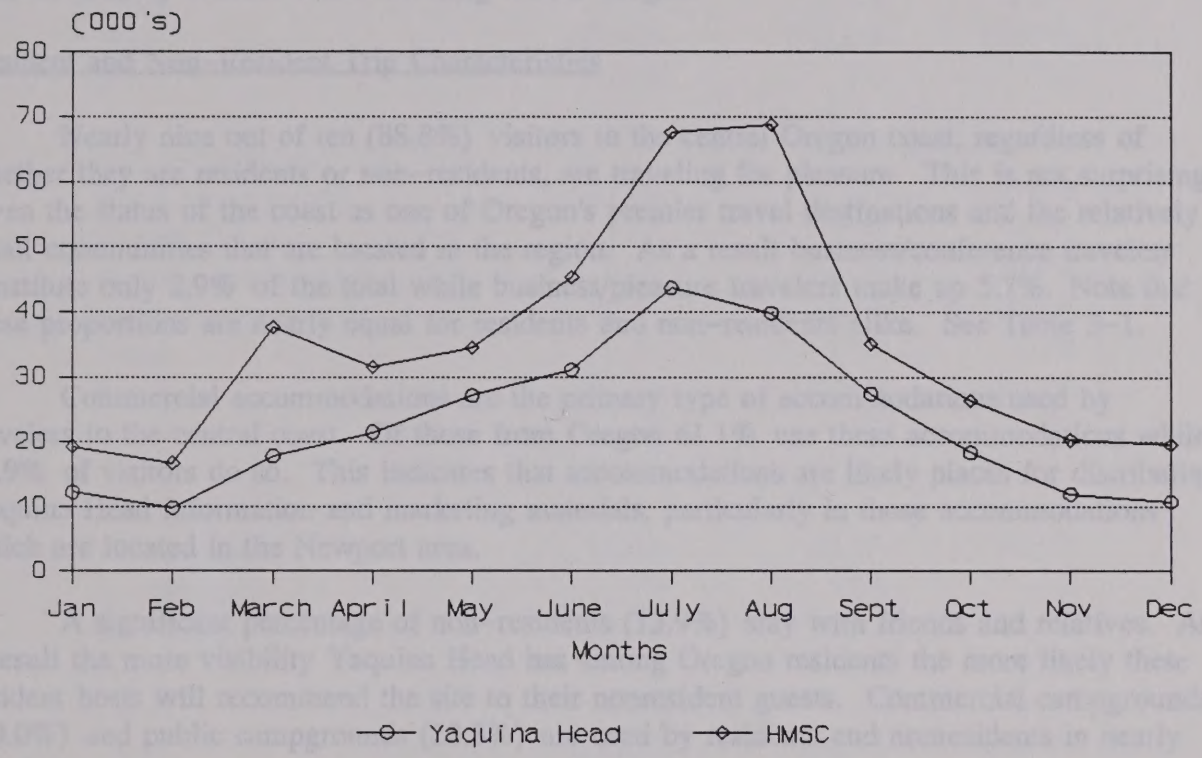
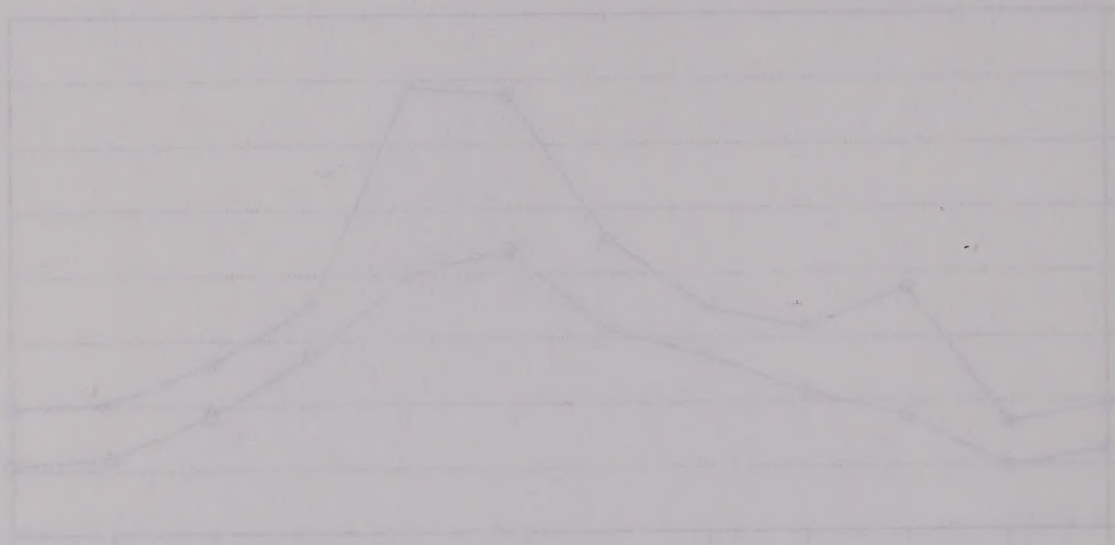


Figure 2-7

MONTHLY VISITATION AT YAQUINA HEAD, HMSC





3. VISITOR PROFILE

The profile of visitors presented in this section of the report is based on a survey of Oregon travelers which was conducted during 1988 for the Oregon Tourism Division (Dean Runyan Associates, 1989). This discussion focuses on those travelers who visited the central Oregon coast and looks at the trip characteristics and demographics of Oregon residents and non-residents. In addition, travelers whose activities included wildlife viewing or studying, are broken out of the sample and compared to those who did not participate in wildlife viewing activities. This chapter also discusses activities, trip planning and information sources used by visitors while traveling within Oregon.

Resident and Non-Resident Trip Characteristics

Nearly nine out of ten (88.8%) visitors to the central Oregon coast, regardless of whether they are residents or non-residents, are traveling for pleasure. This is not surprising given the status of the coast as one of Oregon's premier travel destinations and the relatively small communities that are located in the region. As a result business/conference travelers constitute only 2.9% of the total while business/pleasure travelers make up 5.7%. Note that these proportions are nearly equal for residents and non-residents alike. See Table 3-1.

Commercial accommodations are the primary type of accommodations used by travelers to the central coast. Of those from Oregon 61.1% use these accommodations while 51.9% of visitors do so. This indicates that accommodations are likely places for distributing Yaquina Head information and marketing materials, particularly in those accommodations which are located in the Newport area.

A significant percentage of non-residents (13.9%) stay with friends and relatives. As a result the more visibility Yaquina Head has among Oregon residents the more likely these resident hosts will recommend the site to their nonresident guests. Commercial campgrounds (10.0%) and public campgrounds (20.3%) are used by residents and nonresidents in nearly equal proportions.

Oregon residents (83.6%) use private autos at a much greater rate than non-residents (48.4%), however, while both types of travelers use trailers and RV's (18.8%) those from out-of-state (22.5%) use this transportation mode at a greater rate. This indicates that parking facility design at a developed Yaquina head attraction should consider the impact of larger travel trailers and recreation vehicles. See Figure 3-1.

Table 3-1
TRIP CHARACTERISTICS OF RESIDENT AND NONRESIDENT TRAVELERS FOR THE CENTRAL OREGON COAST

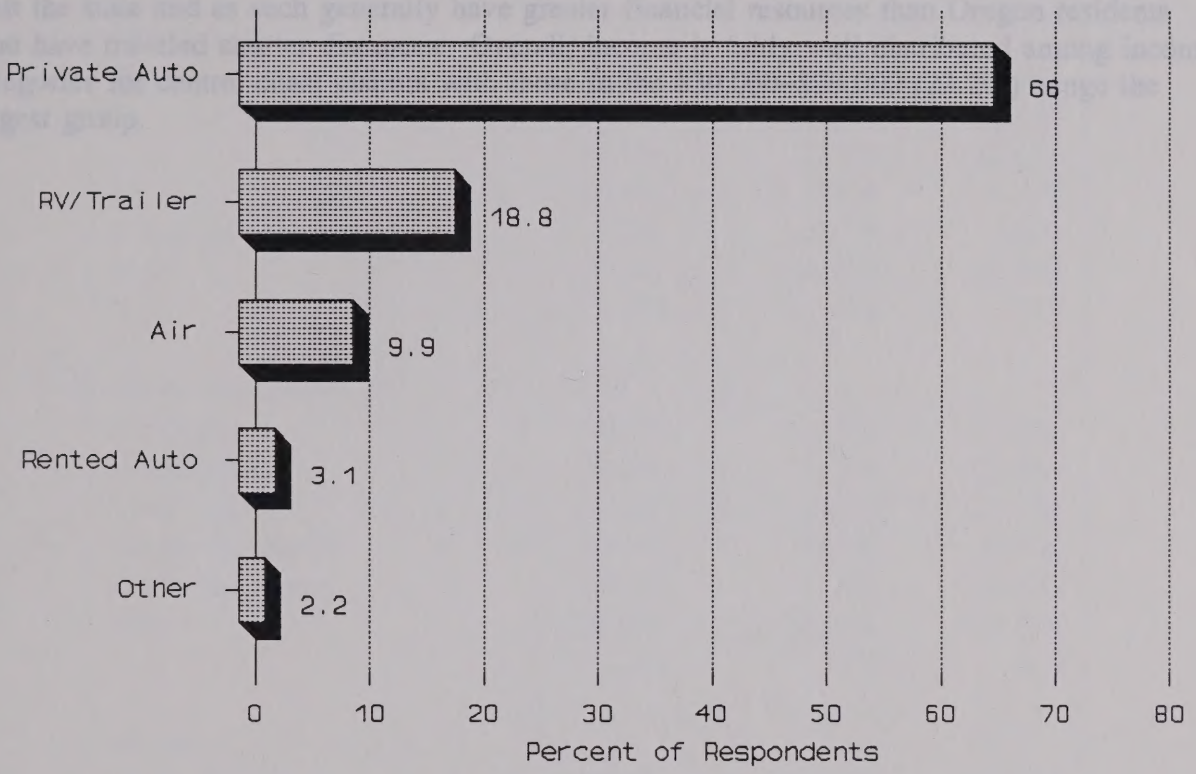
	Oregon Residents	Oregon Visitors	Average
Trip Purpose:			
Pleasure	91.7%	86.0%	88.8%
Bus/Conf	2.8%	2.9%	2.9%
Bus/Plea	5.5%	5.9%	5.7%
Other		5.2%	2.6%
Total	100.0%	100.0%	100.0%
N	145	562	707
Accommodations:			
Hotel Motel Resort	62.1%	51.9%	57.0%
Friends Relatives	3.4%	13.9%	8.7%
Comm. Campground	9.7%	10.4%	10.0%
Public Campground	19.3%	21.3%	20.3%
Other	5.5%	2.5%	4.0%
Total	100.0%	100.0%	100.0%
N	145	578	723
Transport Mode:			
Private Auto	83.6%	48.4%	66.0%
Rented Auto	.7%	5.6%	3.1%
RV/Trailer	15.1%	22.5%	18.8%
Air		19.7%	9.9%
Other	.7%	3.8%	2.2%
Total	100.0%	100.0%	100.0%
N	146	573	719

Resident and Non-Resident Demographic Characteristics

The vast majority of the households of central coast visitors are comprised of couples or families with 84.5% of the total. Somewhat more residents are single people but this is only by small proportion. See Table 3-2. More than half (56.4%) of Oregon resident travelers have no children at home: this group includes both single people, younger couples, and those who are older and whose children have left home. Among the remainder most have one or two children. Less than half (45.6%) of Oregon visitors have no children at home.

Figure 3-1

TRANSPORATION MODE



Particularly among Oregon visitors, the central coast attracts a significant percentage of families. As a result, a developed Yaquina Head attraction should orient a proportion of any proposed educational displays and activities to travelers visiting as a family.

Overall, visitors to the Oregon central coast are highly educated. This is particularly true of out-of state visitors with more than half (55.4%) holding a bachelors or graduate degree. This implies that the proposed Yaquina Head project with an interpretive facility and other educational activities may well become an important stop for well educated visitors who are now touring the Oregon coast. See Table 3-2, Figure 3-2.

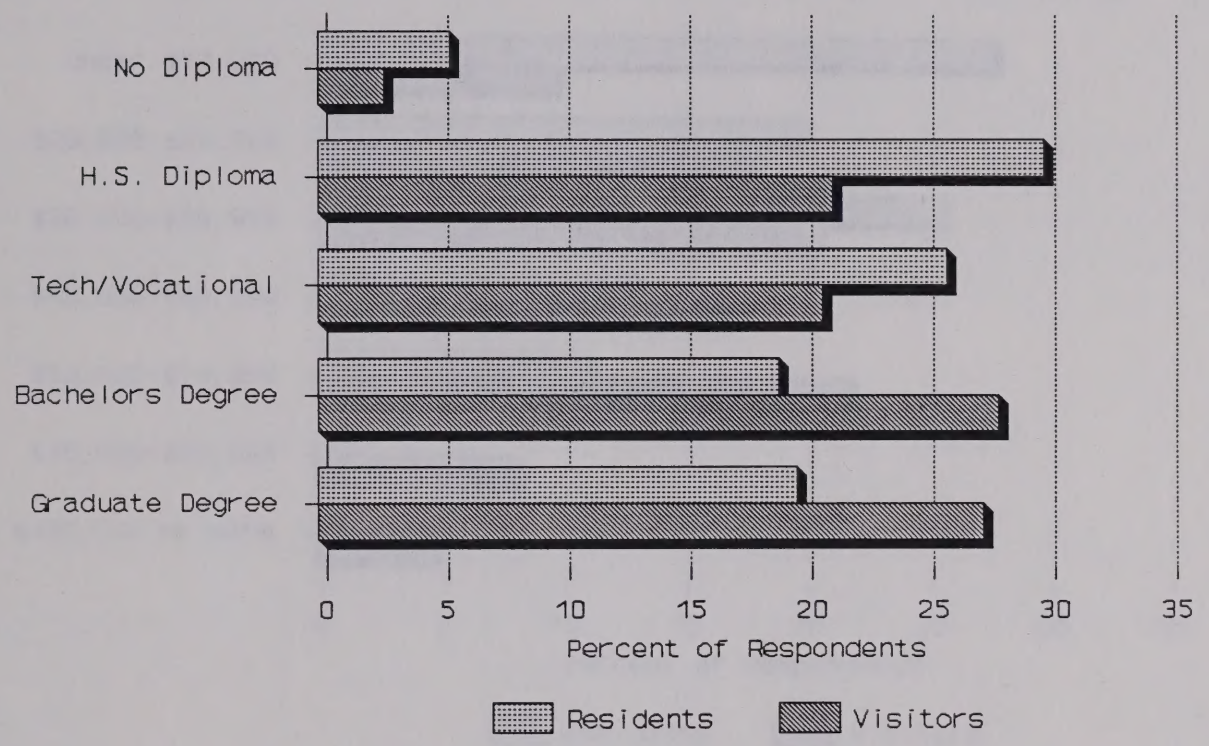
As might be expected, the income of Oregon visitors is somewhat higher than residents. See Table 3-2, Figure 3-3. These travelers have expended time and money to visit the state and as such generally have greater financial resources than Oregon residents who have traveled shorter distances. Overall, income is fairly well distributed among income categories for central coast visitors with those in the $30,000-$39,000 (23.2%) range the largest group.

Table 3-2
DEMOGRAPHIC CHARACTERISTICS OF RESIDENT AND NON-RESIDENT TRAVELERS FOR THE CENTRAL OREGON COAST

	Oregon Residents	Oregon Visitors	Average
Household Type:			
Couple	82.6%	86.4%	84.5%
Single	17.4%	13.6%	15.5%
Total	100.0%	100.0%	100.0%
N	149	572	721
Children at Home:			
None	56.4%	45.6%	51.0%
1	22.4%	20.0%	21.3%
2	12.9%	23.3%	18.1%
3	5.4%	7.4%	6.4%
4 or more	2.7%	3.6%	3.2%
Total	100.0%	100.0%	100.0%
N	149	589	738
Education Level:			
No Diploma	5.4%	2.7%	4.0%
HS Diploma	29.9%	21.2%	25.6%
Tech/Voc	25.9%	20.8%	23.4%
Bachelors Degree	19.0%	28.0%	23.5%
Graduate Degree	19.7%	27.4%	23.5%
Total	100.0%	100.0%	100.0%
N	149	520	669
Income:			
Under $20,000	27.8%	9.7%	18.7
$20,000-$29,999	20.1%	17.8%	18.9
$30,000-$39,999	25.7%	20.6%	23.2
$40,000-$49,999	13.2%	16.8%	15.0
$50,000-$74,999	11.1%	22.0%	16.6
$75,000-$99,999	1.4%	8.3%	4.9
$100,000 or more	.7%	4.8%	2.7
Total	100.0%	100.0%	100.0%
N	144	554	698

Figure 3-2

EDUCATION BY OREGON RESIDENTS, VISITORS



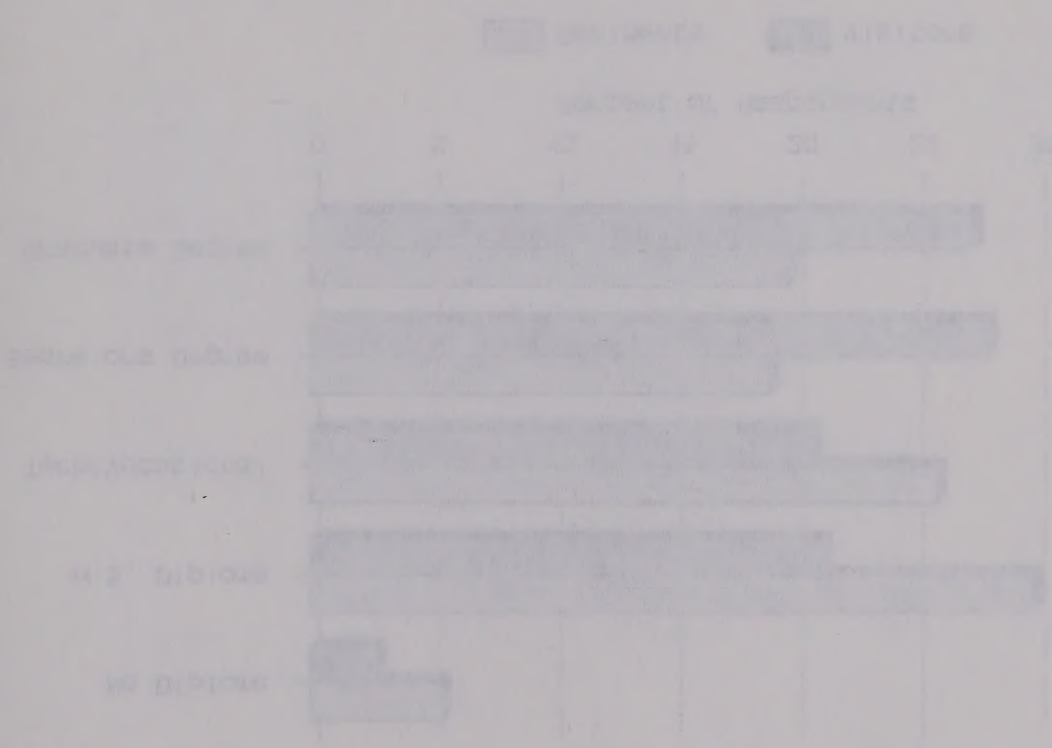
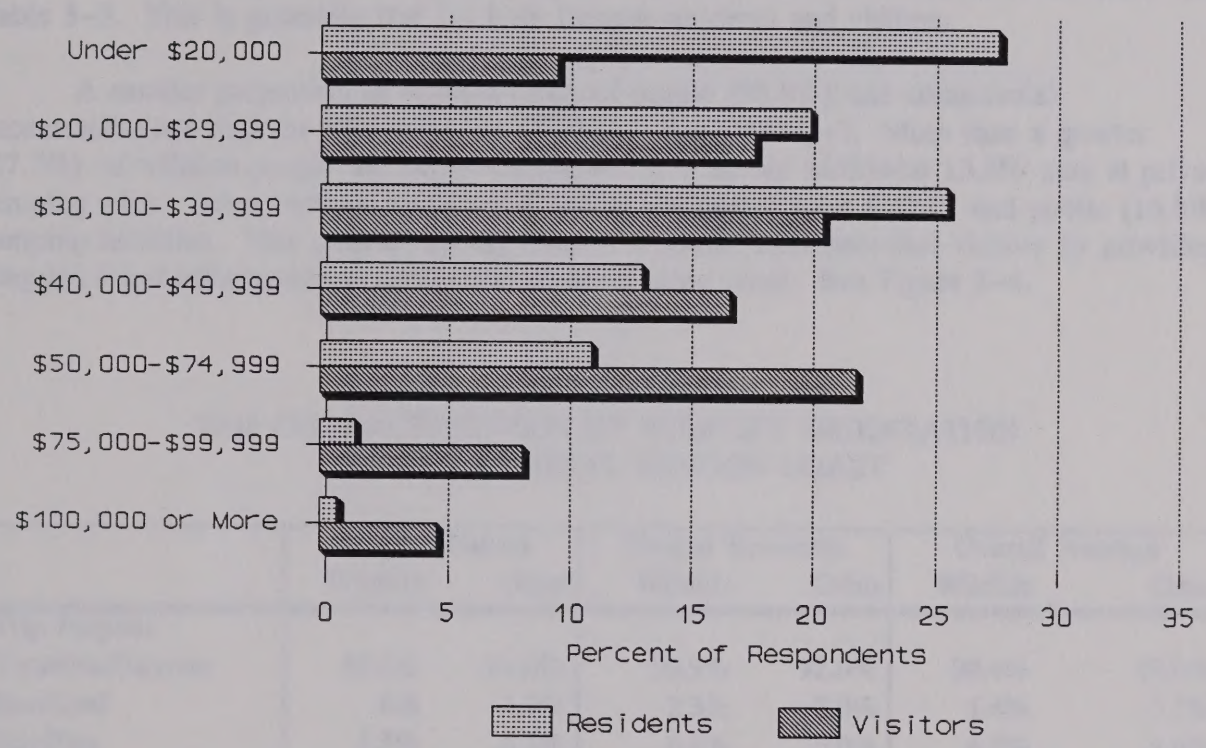
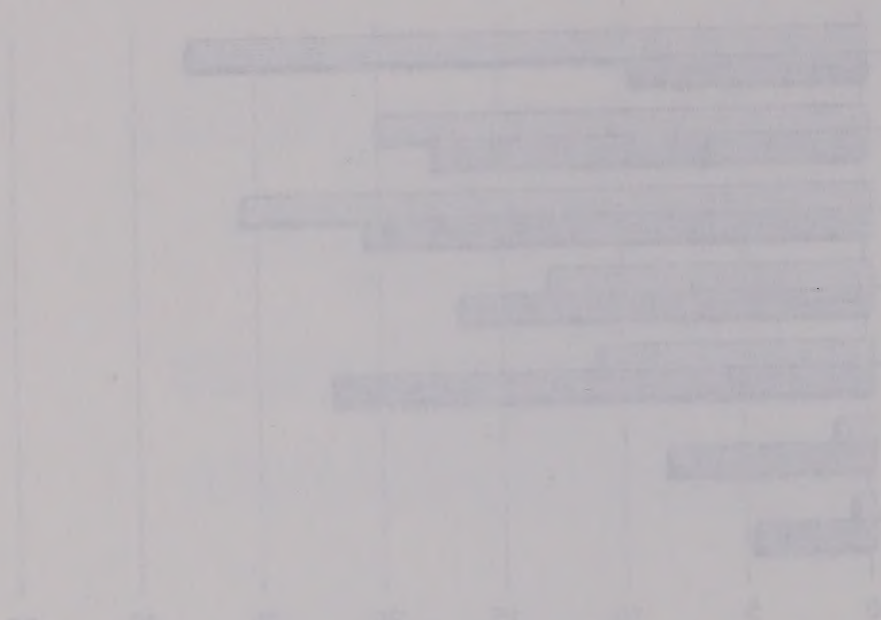


Figure 3-3

INCOME BY OREGON RESIDENTS, VISITORS





Wildlife Orientation and Trip Characteristics

Whether it be tidepool creatures, sea birds, sea lions, or migrating whales, one of the primary attractions offered by Yaquina Head is the opportunity to view and study wildlife. For this reason, the following section shows central coast visitors broken out by orientation toward viewing and studying wildlife. For this analysis visitors and residents are shown separately, plus a combination of the two categories to represent typical Central Coast travelers. For this latter combination it is assumed that coastal travelers consist equally of residents and visitors.

Overall, those with a wildlife orientation are somewhat more likely to visit for pleasure or business/pleasure and less likely for business/conference than other travelers. See Table 3-3. This is generally true for both Oregon residents and visitors.

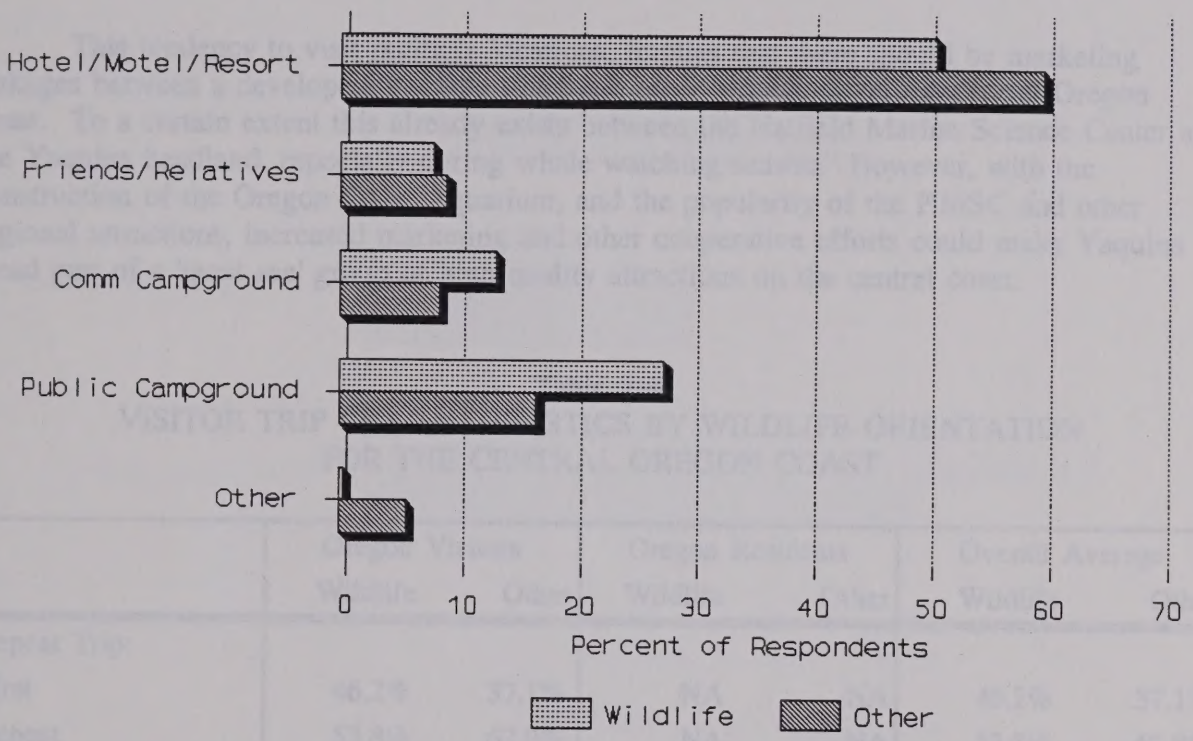
A smaller proportion of wildlife oriented people (50.8%) use commercial accommodations than do other travelers (59.9%). See Table 3-3. More than a quarter (27.7%) of wildlife people use public campgrounds while an additional 13.3% stay at private camping sites. Other visitors are less inclined to use both private (8.5%) and public (16.8%) camping facilities. This presents an opportunity to reach these potential visitors by providing Yaquina Head information at public and other camping areas. See Figure 3-4.

Table 3-3
TRIP CHARACTERISTICS BY WILDLIFE ORIENTATION
FOR THE CENTRAL OREGON COAST

	Oregon Visitors		Oregon Residents		Overall Average	
	Wildlife	Other	Wildlife	Other	Wildlife	Other
Trip Purpose:						
Vacation/Pleasure	89.8%	84.0%	90.9%	92.0%	90.4%	88.0%
Bus/Conf	.6%	4.0%	2.3%	3.0%	1.4%	3.5%
Bus/Plea	5.5%	6.1%	6.8%	5.0%	6.2%	5.6%
Other	4.1%	5.8%			2.0%	2.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	196	366	44	101	240	467
Accommodations:						
Hotel/Motel/ Resort	49.2%	53.4%	52.3%	66.3%	50.8%	59.9%
Friend/Relative	11.4%	15.2%	4.5%	3.0%	7.9%	9.1%
Comm. Camp	10.8%	10.2%	15.9%	6.9%	13.3%	8.5%
Public Camp	28.2%	17.7%	27.3%	15.8%	27.7%	16.8%
Other	.5%	3.5%		7.9%	0.3%	5.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	198	360	44	101	242	461

Figure 3-4

ACCOMMODATIONS BY WILDLIFE ORIENTATION



Wildlife oriented people are more likely to be first time visitors to Oregon than other travelers. See Table 3-4. First time visitors are often open to 'discovering' Oregon, and given an interest in viewing and studying wildlife, these people are good candidates for a visit to a developed Yaquina Head attraction.

Table 3-4 shows whether visitors concentrated their trip on one, two to three, or many locations. Wildlife oriented people, particularly visitors, are more likely to visit many locations. For the overall average 54.6% of the wildlife category versus 40.9% of others visit many locations. Of wildlife oriented residents, 30.4% make multiple visits compared to 14.6% of others. For visitors, 78.8% of wildlife oriented people visit many places compared to 67.3% of others. See Figure 3-5.

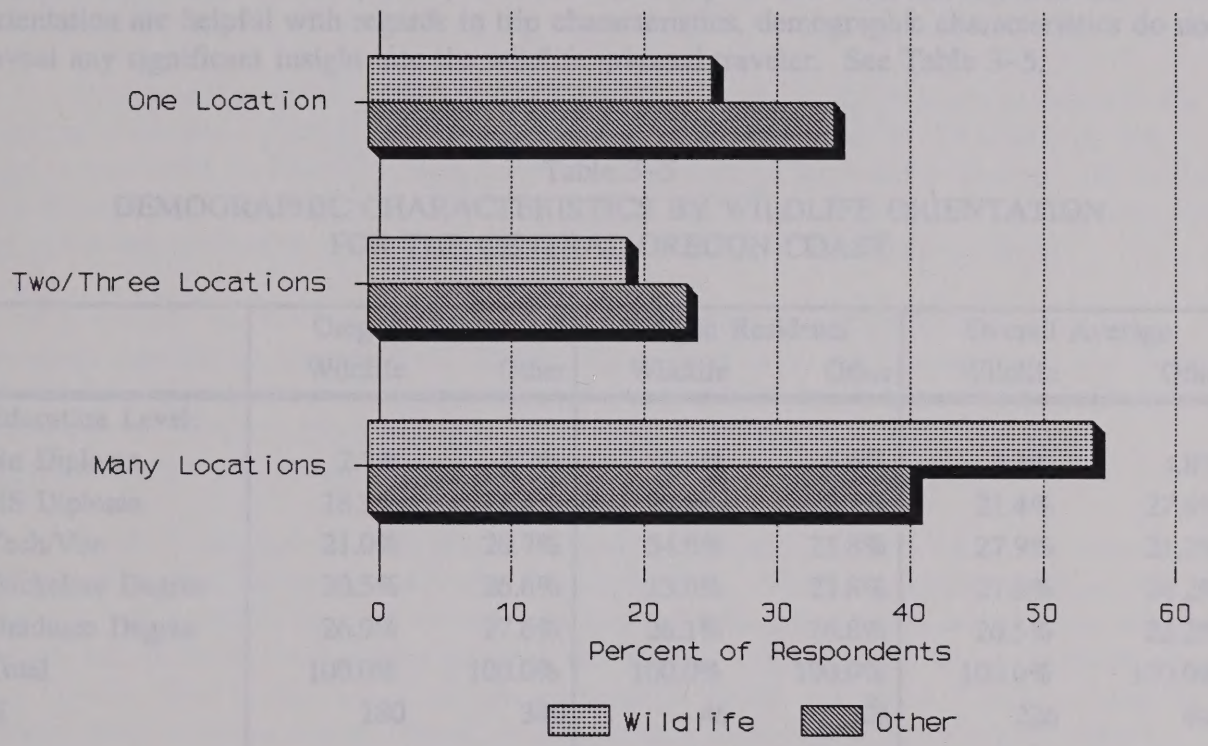
This tendency to visit multiple locations, implies that there should be marketing linkages between a developed Yaquina Head and other attractions on the central Oregon coast. To a certain extent this already exists between the Hatfield Marine Science Center and the Yaquina headland, especially during whale watching season. However, with the construction of the Oregon Coast Aquarium, and the popularity of the HMSC and other regional attractions, increased marketing and other cooperative efforts could make Yaquina Head part of a 'must see' group of high quality attractions on the central coast.

Table 3-4
VISITOR TRIP CHARACTERISTICS BY WILDLIFE ORIENTATION
FOR THE CENTRAL OREGON COAST

	Oregon Visitors		Oregon Residents		Overall Average	
	Wildlife	Other	Wildlife	Other	Wildlife	Other
Repeat Trip:						
First	46.2%	37.1%	NA	NA	46.2%	37.1%
Repeat	53.8%	62.9%	NA	NA	53.8%	62.9%
Total	100.0%	100.0%	NA	NA	100.0%	100.0%
N	200	383	NA	NA	200	383
Locations Visited:						
One Location	8.4%	9.9%	43.5%	60.2%	25.9%	35.1%
Two/Three Locations	12.8%	22.8%	26.1%	25.2%	19.5%	24.0%
Many Locations	78.8%	67.3%	30.4%	14.6%	54.6%	40.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	201	379	46	103	247	481

Figure 3-5

MULTIPLE LOCATIONS BY WILDLIFE



Wildlife Orientation and Demographics

For the overall average there is little difference in education levels between those with a wildlife interest and other visitors. See Table 3-5. While Oregon visitors have somewhat higher education levels, the percentage of wildlife enthusiasts who are college educated (57.4%) only slightly exceeds the other group (54.2%). The same holds true for Oregon residents with college educated wildlife people at (39.1%) and others at (38.6%).

Income distributions for wildlife oriented visitors versus the other category are much like education levels. Essentially there is no difference in income levels between these groups. Only for Oregon resident travelers in the $30,000 to $39,999 range is there a difference between wildlife (31.8%) and other (23.0%). While breakouts by wildlife orientation are helpful with regards to trip characteristics, demographic characteristics do not reveal any significant insight into the wildlife oriented traveler. See Table 3-5.

Table 3-5
DEMOGRAPHIC CHARACTERISTICS BY WILDLIFE ORIENTATION
FOR THE CENTRAL OREGON COAST

	Oregon Visitors		Oregon Residents		Overall Average	
	Wildlife	Other	Wildlife	Other	Wildlife	Other
Education Level:						
No Diploma	2.7%	2.7%	2.2%	6.9%	2.4%	4.8%
HS Diploma	18.9%	22.4%	23.9%	32.7%	21.4%	27.6%
Tech/Voc	21.0%	20.7%	34.8%	21.8%	27.9%	21.2%
Bachelors Degree	30.5%	26.6%	13.0%	21.8%	21.8%	24.2%
Graduate Degree	26.9%	27.6%	26.1%	16.8%	26.5%	22.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	180	340	46	101	226	441
Income:						
Under $20,000	9.2%	10.0%	18.2%	32.0%	13.7%	21.0%
$20,000-$29,999	19.6%	16.8%	25.0%	18.0%	22.3%	17.4%
$30,000-$39,999	18.3%	21.9%	31.8%	23.0%	25.0%	22.5%
$40,000-$49,999	17.6%	16.3%	11.4%	14.0%	14.5%	15.1%
$50,000-$74,999	24.7%	20.6%	9.1%	12.0%	16.9%	16.3%
$75,000-$99,999	6.9%	9.0%	2.3%	1.0%	4.6%	5.0%
$100,000 or more	3.7%	5.4%	2.3%		3.0%	2.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	191	364	44	100	235	464

Wildlife Orientation and Activities

Those with an orientation toward wildlife viewing and studying participate in a number of activities at a greater rate than do other travelers. The activities with the most pronounced differences in participation rates include hiking (wildlife 60.8% versus other 33.7%), picnicking (68.7% v. 42.4%), small town shopping (70.2% v. 49.1%), and visiting a museum or historic site (67.5% v. 36.6%). See Table 3-6, Figure 3-6.

Wildlife oriented people also prefer to attend cultural/art events (30.3% v. 17.0%), festivals and fairs (36.0% v. 18.3%), and travel to relax and sightsee (96.0% v. 81.9%). While those interested in viewing and studying wildlife participate in many activities at a greater rate than other travelers these above mentioned activities have the greatest impact on a developed Yaquina Head attraction.

Hiking and picnicking are two activities which could easily be accommodated at the Yaquina Head area. Hiking trails could be laid out in several areas of the headland, and picnic areas could be located in wind protected sites such as the summer leeward side of the rock quarry. The opportunity to visit a historic site is another offering at Yaquina Head with the lighthouse and native American history excellent potential interpretive subjects.

Certainly, the activities available at Yaquina constitute a relaxing experience with numerous sightseeing opportunities. In addition, depending on the interpretive facility design, art and cultural exhibitions relating to coastal themes and the local area could be held on a periodic basis. Finally, the community of Newport offers the small town shopping opportunities that wildlife oriented people seek.

For the most part the activities of Oregon visitors and residents follow the overall average. However, differences do occur in several areas. Wildlife oriented residents are more inclined to picnic than are visitors. Oregon residents interested in wildlife also attend cultural and art events at a greater rate than do visitors. Consequently, art and cultural events at a Yaquina Head facility would be best marketed to resident travelers. Finally, visitors to Oregon show a greater overall interest in historic sites regardless of activity preference. Visiting museums and historical sites is preferred by Oregon wildlife enthusiasts by a three to one margin over other resident travelers.

Figure 3-6

ACTIVITIES BY WILDLIFE ORIENTATION

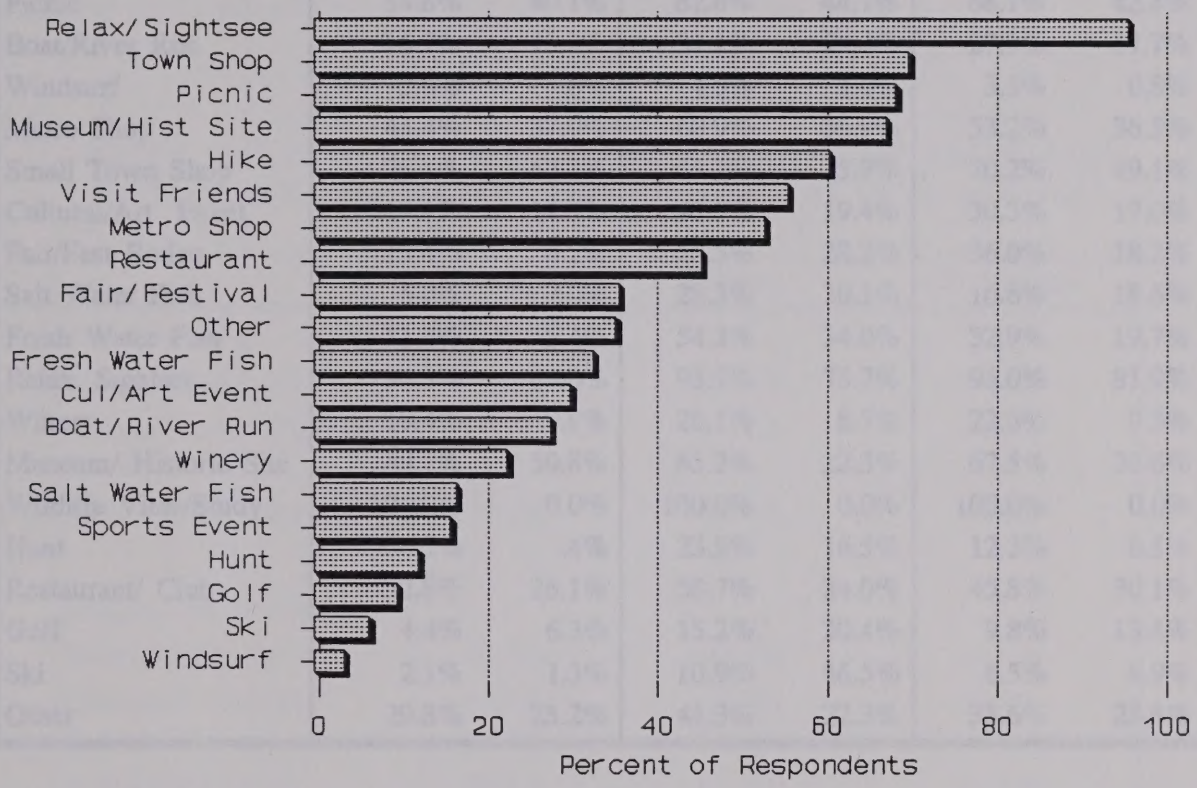


Table 3-6
TRAVEL RELATED ACTIVITIES BY WILDLIFE ORIENTATION
FOR THE CENTRAL OREGON COAST

Activities	Oregon Visitors		Oregon Residents		Overall Average	
	Wildlife	Other	Wildlife	Other	Wildlife	Other
Visit Friends/Rel	38.1%	45.4%	73.9%	67.0%	56.0%	56.2%
Sports Event	6.0%	2.8%	26.1%	22.3%	16.1%	12.5%
Hike	60.6%	38.3%	60.9%	29.1%	60.8%	33.7%
Picnic	54.8%	40.1%	82.6%	44.7%	68.7%	42.4%
Boat/River Run	16.7%	13.9%	39.1%	21.4%	27.9%	17.7%
Windsurf	2.6%	.6%	4.3%	1.0%	3.5%	0.8%
Metro Shop	45.4%	37.0%	60.9%	35.9%	53.2%	36.5%
Small Town Shop	75.1%	62.3%	65.2%	35.9%	70.2%	49.1%
Cultural/Art Event	17.1%	14.6%	43.5%	19.4%	30.3%	17.0%
Fair/Fest Rodeo	15.4%	8.2%	56.5%	28.2%	36.0%	18.2%
Salt Water Fish	5.2%	7.0%	28.3%	30.1%	16.8%	18.6%
Fresh Water Fish	11.4%	5.4%	54.3%	34.0%	32.9%	19.7%
Relax, Sightsee	96.3%	88.0%	95.7%	75.7%	96.0%	81.9%
Winery	19.4%	9.9%	26.1%	8.7%	22.8%	9.3%
Museum/ Historic Site	69.7%	50.8%	65.2%	22.3%	67.5%	36.6%
Wildlife View/Study	100.0%	0.0%	100.0%	0.0%	100.0%	0.0%
Hunt	.7%	.4%	23.9%	16.5%	12.3%	8.5%
Restaurant/ Club	32.8%	26.1%	58.7%	34.0%	45.8%	30.1%
Golf	4.4%	6.3%	15.2%	20.4%	9.8%	13.4%
Ski	2.1%	1.3%	10.9%	16.5%	6.5%	8.9%
Other	29.8%	25.2%	41.3%	22.3%	35.6%	23.8%

Visitor Trip Planning Information Sources

As shown in Table 3-7, nearly two thirds of all visitors to the central Oregon coast do some initial route planning and then stop at points of interest along the way. An additional 16.7% do no planning and about a quarter (24.5%) plan their trip and stops carefully. This holds true regardless of interest though wildlife oriented people do slightly more route planing while other travelers are somewhat less inclined to plan at all.

This indicates that Yaquina Head has an excellent opportunity to capture travelers who are touring the Oregon coast and who are open to unplanned stops at area attractions. Certainly highway signage, and information and marketing links with local attractions such as the HMSC and Oregon Coast Aquarium will draw these footloose tourists to Yaquina Head.

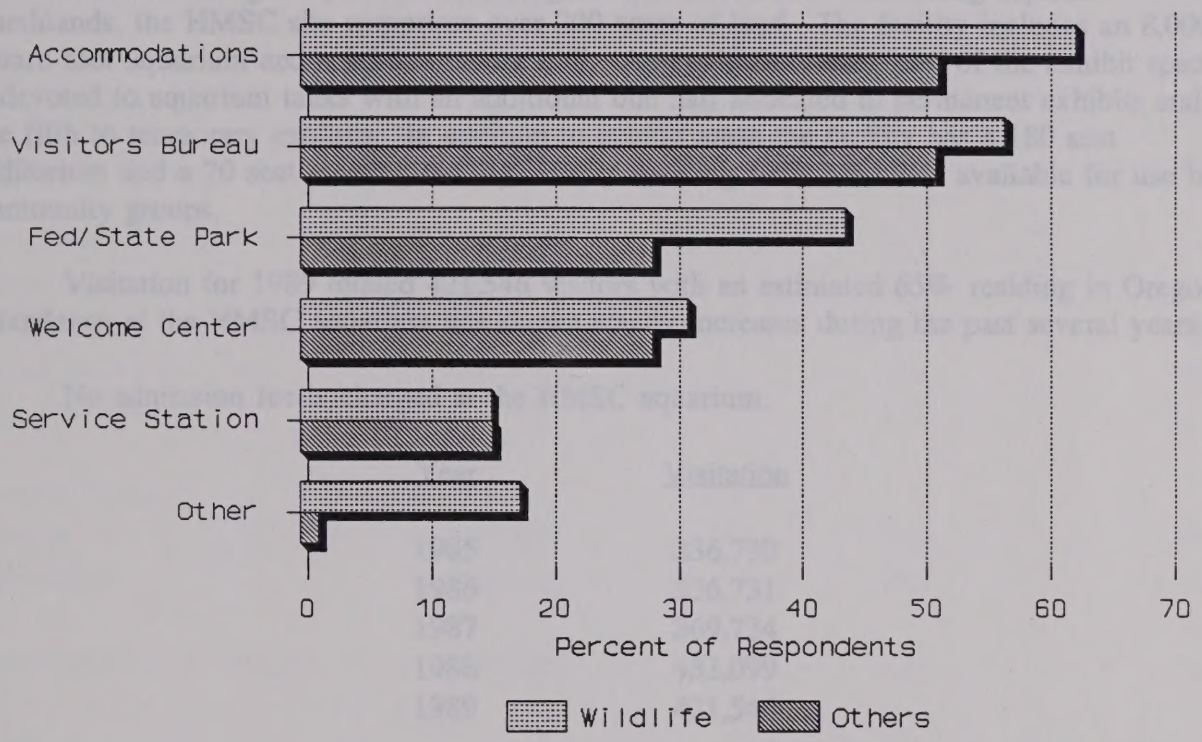
Table 3-7 shows the local information sources used by travelers in the central coast region. More than half (55.4%) of all visitors get local travel information at their accommodations. This is especially true of wildlife oriented visitors (62.6%). Accommodations are therefore important conduits for information regarding a developed Yaquina Head attraction. Other much utilized local information sources include, the community's visitor and convention bureau (53.2%), and state welcome centers (29.5%). Finally, those interested in wildlife viewing and studying (44.0%) are far more inclined to use federal and state park offices than other (28.5%) visitors. See Figure 3-7.

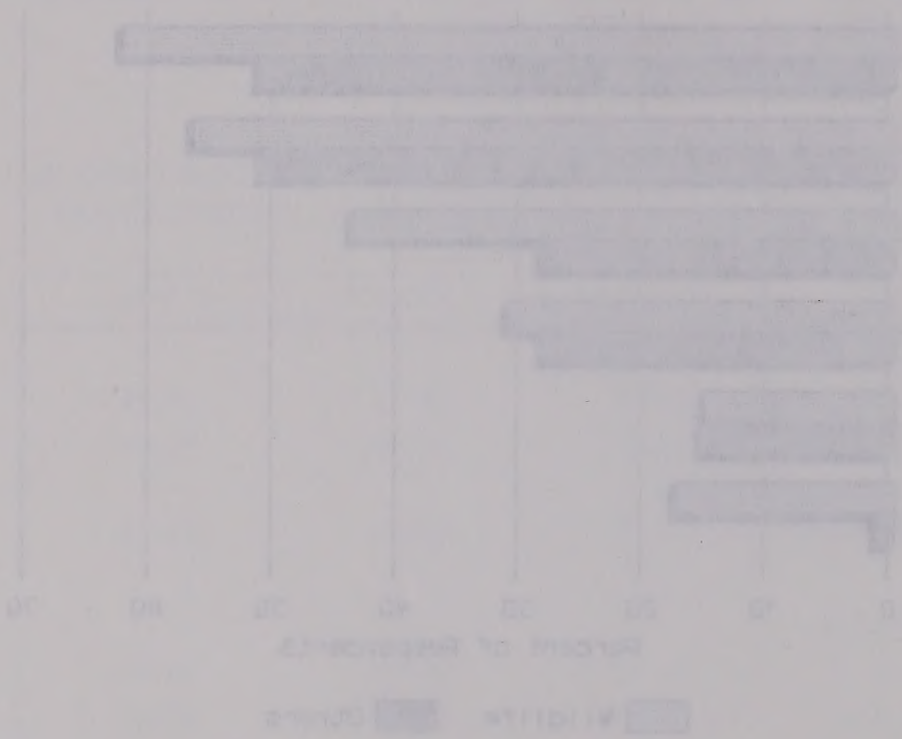
Table 3-7
VISITOR TRIP PLANNING, INFORMATION SOURCES WITHIN OREGON BY WILDLIFE ORIENTATION, FOR THE CENTRAL OREGON COAST

	Wildlife	Other	All Visitors
Trip Planning:			
Planned Carefully	24.8%	24.3%	24.5%
Planned Route But Not Stops	62.4%	57.1%	58.9%
Little Or No Planning	12.8%	18.6%	16.7%
Oregon Information:			
Welcome Center	31.3%	28.5%	29.5%
Chamber/ Visitors Bureau	56.8%	51.3%	53.2%
Accommodations	62.6%	51.5%	55.4%
Fed./State Park Office	44.0%	28.5%	34.0%
Service Station	15.4%	15.6%	15.5%
Other	17.7%	18.5%	18.2%

Figure 3-7

LOCAL INFORMATION SOURCES BY WILDLIFE





4. PROFILE OF COMPARABLE ATTRACTIONS

Hatfield Marine Science Center

The Hatfield Marine Science Center (HMSC) is located in Newport, Oregon in the south section of the city with easy access off of U.S. Highway 101. The facility is sited on a point which extends northward into Yaquina Bay offering vistas of the bay and the Newport wharf area across the bay to the north.

The HMSC aquarium is operated as a extension of Oregon State University and dedicated to educating the public about Oregon coastal resources. Including adjacent marshlands, the HMSC site comprises over 200 acres of land. The facility includes an 8,000 square foot aquarium and a 1.3 km nature trail. Approximately one third of the exhibit space is devoted to aquarium tanks with an additional one half allocated to permanent exhibits and one fifth to temporary exhibits. In addition to exhibit areas the facility has a 180 seat auditorium and a 70 seat meeting facility. These meeting areas are made available for use by community groups.

Visitation for 1989 totaled 421,546 visitors with an estimated 65% residing in Oregon. Attendance at the HMSC aquarium has shown steady increases during the past several years.

No admission fee is charged at the HMSC aquarium.

Year	Visitation
1985	336,730
1986	336,731
1987	369,734
1988	433,099
1989	421,546

An October 1988 survey administered to 198 visitors showed the following: (Origin) 5% live within 40km, 48% elsewhere in Oregon; 31% from California and Washington, 17% from Central states, 5% from eastern states, 5% other countries. (Age) 13% under 30 years old, 34% 31 to 50, 53% over 51. (First Visit) 51% first time visitors, 33% visited at least twice during the past year. Though this initial survey is based on a small sample the center plans to continue the survey for an annual demographic profile.

The aquarium is open daily except Christmas with summer visiting hours from 9:30am to 6pm and winter hours 10am to 4pm. Groups sometimes visit earlier or later depending on reservation arrangements. Traffic through the aquarium is steady with minor periods of rush or quiet. Peak visitation hours are generally between noon and 3pm. Attendance at scheduled activities is about two thirds to maximum capacity.

The center schedules a variety of special summer activities call "Seataugua". These activities include nature walks, films, talks by marine scientists, continuing teacher education, and sixteen 2 and 3 day workshops. Other activities during the remainder of the year include whale watching weeks at coastal headlands and daily film presentations. Due to weather conditions outdoor activities are primarily during the Summer with indoor workshops held in Winter. The following table shows HMSC activities and attendance.

Activity	Audience Grade Level	# of Participants 1987–88	1988–89
Indoor Education	K–12	10,140	14,040
Daily Films	All Ages	42,700	51,500
Outreach:			
Mr./Mrs. Fish	K–6	14,600	11,680
Whale Watching	All Ages	13,110	19,990
Special Workshops	All Ages	255	210
Presentations	All Ages	360	510
Nature Walks	All Ages	1,530	860
Public Boat Dock Tours	All Ages	440	980
R/V Sacajewea	4–12	130	220
Yaquina Head:			
Birding	All Ages	7,140	2,630
Tidepooling	All Ages	550	2,700
Natural History Excursions	All Ages	230	230
Total		91,185	106,550

Note that Yaquina Head activities are now managed by the Bureau of Land Management with the assistance of HMSC in staff training and marketing.

Sources of income for the HMSC 1988/89 fiscal year are as follows:

Revenue:		
Income from museum store	$124,306	30.0%
Income from tuition fees, publications, performances etc.	$15,205	3.7%
Support:		
Individual contributions	$2,830	0.7%
State and local support	$36,575	8.8%
Parent organization	$235,298	56.8%
Total	414,223	100.0%

Staffing at the HMSC consists of 3 permanent fulltime positions, 2.5 FTE graduate students (teaching assistants), 10 part time students, 85 part time volunteers, and various Oregon State University faculty.

Oregon Dunes National Recreation Area Visitors Center

The Oregon Dunes NRA visitors information center is located in Reedsport which is at the halfway point of the 47 mile dunes recreation area. The center is operated by the U.S. Forest Service.

The center is approximately 1,274 square feet in size and consists of a 730 square foot information area for displays and book sales, and a 544 square foot theater. A movie on the dunes is shown to the public during visitors hours. An estimated 30% of those who visit the center choose to view the movie.

The Dunes Visitors Information Center is open from 8am to 4:30pm seven days a week from April thru September, and the same hours Monday thru Friday the remainder of the year. Peak attendance is estimated to be from 10am to 2pm with an average length of stay of about 15 minutes for those who do not watch the movie to about 30 minute for those who do.

Annual visitation at the information center for the past several years is as follows:

Year	Visitation
1985	11,240
1986	12,062
1987	15,060
1988	18,042
1989	21,786

Visitation at the center is very seasonal with 70.7% of annual visits occurring during the months of June through September. August is the peak month for attendance with 23% of the 1989 total or 5,002 visitors.

Staffing consists of one full time and one part time employee plus two full time volunteers. The center's operating budget is approximately $30,000 for salary/benefit costs but does not include rent/utilities/phone.

Cape Perpetua Visitors Center

The Cape Perpetua visitors center is located approximately two miles south of Yachats just south of the Cape Perpetua headland. The facility is operated by the U.S. Forest Service.

Attendance at the Cape Perpetua visitors center for 1989 was approximately 89,250 people. This includes 1,244 children attending with groups from 36 schools. Activity by school groups occurs primarily during the months of March and April. Note that 1989 visitation was below average due to temporary closure of the visitor center. Typical annual average visitation is approximately 100,000 people per year.

Staffing consists of the following: Summer; one full time (Director), five full time (naturalists), one part time (maintenance). Winter; one full time (Director), one temporary full time (Nov.,Dec) shifts to part time (Jan. thru March), one part time.

The Cape Perpetua visitors center is funded through its parent agency the U. S. Forest Service. The Forest Service is in turn funded through the federal budgetary process. Note that due to federal deficit reduction efforts the 1990 proposed Cape Perpetua budget is more than fifty percent less than the operating budget for the previous year.

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As a result of the proposed 1990 federal budget the center will operate with the following :

Staffing	$41,000
Vehicles	$2,000
Utilities, Maintenance, Supplies	$8,500
Total	$52,280

Columbia River Maritime Museum

The Columbia River Maritime Museum was established in 1962 to preserve the maritime heritage of the Columbia River. The museum moved to its current location in 1982. The museum is a private nonprofit corporation funded by membership dues, private contributions and admission fees.

The museum facility is comprised of three buildings totaling 37,000 square feet. The museum also maintains the lightship Columbia which is floating and kept in operating condition and is open to the public. It has a fully licensed ham radio station on board, operated by an amateur radio club which broadcasts information about the museum worldwide. A quarterly newspaper named The Quarterdeck Review was started in 1972.

Annual visitation ranges from 80,000 to 100,000 with the majority (71%) attending from May through October. Admissions are $3.00 for adults, $2.00 for seniors, $1.50 for students and children under 6 years are free. Approximately 70% of all visitors are adults.

Year	Visitation
1985	84,578
1986	89,722
1987	96,822
1988	89,323
1989	92,576

The origin of visitors varies substantially by season. The following are estimates of visitor origin for visits other than school tours:

Visitor Origin	Peak	Off-Peak
Clatsop County	2%	15%
Oregon/Washington	23%	60%
Elsewhere	75%	25%

The museum is open from 9:30am to 5pm with the greatest visitor traffic from 11am to 5pm. The average length of stay is one hour. In 1989 more than 4,000 school children attended in groups.

The museum's membership program maintains between 1,500 and 2,000 members with donations ranging from $15 for a family membership to $5,000 for life memberships. Corporate sponsors also provide funding for the museum and an endowment has been established providing approximately 20% of the museums annual income.

Staff size varies by season with a summer staff of 12 full time and 10 part time employees while winter staff consists of 12 full time and 5-6 part time people. In addition, the museum maintains a volunteer pool of between 50 and 60 people, some of whom are skilled in boat and marine construction and restoration.
However, due its relatively remote location the museum is very limited in its ability to use volunteers.

Devil's Elbow State Park

The Oregon state park at Devil's Elbow is used as a comparable for Yaquina Head because, like Yaquina, the park provides access to a historic lighthouse. Located off of highway 101 about 13 miles north of Florence the Heceta Head lighthouse is one of the most renowned and most photographed scenic sites on the Oregon coast.

Devil's Elbow state park consists of a small cove beach and a system of hiking trails, some of which lead up to the headland including the area around the lighthouse. The park also includes picnic facilities, public restrooms, and fishing sites. There is no interpretive center or visitor center. Signage provides information about the site.

Figures regarding visitor origin and demographics are not available. However, given the park's access to Highway 101, the percentage of out-of-state visitors in the summer season is likely to be significant. Devil's Elbow is a day use area with the following visitation figures:

Year	Visitation
1985	335,288
1986	340,497
1987	328,984
1988	353,108
1989	341,322

Devil's Punchbowl State Park

This state park provides a viewpoint to a unique rock formation known as Devil's Punchbowl and access to the Otter Rock marine gardens. The presence of marine gardens makes Devil's Punchbowl an appropriate comparable for Yaquina Head.

Devil's Punchbowl is located approximately five miles north of Yaquina Head with access via the Otter Rock Highway off of Highway 101. The road to this park is somewhat less direct than the road to Yaquina Head which offers direct access from Highway 101.

In addition to scenic viewpoints and marine gardens, the state park at Devil's Punchbowl also provides picnic facilities, hiking trails, and access to the beach area beyond the marine gardens. The site does not have a visitors information or interpretive center.

As with Devil's Elbow, visitor origin and demographic figures are not available. However, we can safely assume that the percentage of visitor who are from out-of-state is significant, particularly in the summer season.

The park is a day use area. Note that the following annual visitation numbers show an unexpected decline in attendance. In fact, these numbers reflect a repositioning of the park's traffic counter due to road construction and improvements. Visitors frequently park their vehicles in areas which are not counted and walk to the beach and marine gardens. Local park officials indicate that attendance at Devil's Punchbowl has been constant since 1985 with the park at full capacity during the summer months.

The full capacity status of Devil's Punchbowl indicates a very high interest in marine gardens as an attraction. Yaquina Head and its proposed improvements should benefit from proximity to a marine garden attraction already at capacity.

Year	Visitation
1985	479,978
1986	459,550
1987	415,428
1988	373,172
1989	317,276

Sea Lion Caves

Sea Lion Caves, a private for-profit facility, has been included as a comparable primarily for information regarding admission fees.

Sea Lion Caves is located 11 miles north of Florence on Oregon Coast Highway 101. The facility consists of a naturally occurring cave in the coastal escarpment which is open to the sea and populated by a colony of seals. Visitor access is by a trail and viewing area along the upper portion of the cave.

The facility is open all year with operating hours between 8am and 8pm. The building covers 2 1/2 stories and is approximately 28,000 sf. A staff of 16 to 40 is maintained depending on the season. Annual visitation is approximately 250,000 with 70% visiting during May through September and 50% visiting in the summer months of June, July, and August.

According to survey results from summer 1988, visitor origin is 7.9% Oregon, 16.7% Washington, 57.9% other U.S., and 17.5% foreign visitors.

The fee structure is $4.00 for those 16 years and over, $2.50 for those 6 to 15 years, and free for under 6 years. There is a roughly even mix of adult/child attendance in the summer with an increase in the proportion of older adults visiting in the autumn and winter months. Note that of the total visitation about 50,000 visitors do not pay admissions but only browse through the gift shop.

5. VISITOR VOLUME FORECAST

This chapter forecasts visitor volume for Yaquina Head for 1995, with a projection to the year 2000. Forecasts are prepared for three development scenarios so as to show the sensitivity of the forecast to assumptions regarding the attractiveness of the facility. Forecasts consist of figures for annual and monthly visitor volume, average and peak daily volume, and volume for the design day.

Yaquina Head Development Scenarios

For purposes of forecasting visitor volume we identify two development scenarios, each of which is carried entirely through the forecasting process. This approach, rather than forecasting volume for a single scenario, 1) illustrates the sensitivity of the forecast to the data and assumptions on which it is base, and 2) provides a better view of the effects which development scope and phasing will have on visitation.

In addition a third analysis investigates the effect of charging an admission fee for the visitor center.

The development scenarios are as follows:

Scenario 1:

- high quality interpretative facility, including at least some ancillary interpretative development (such as at the tide pool or lighthouse)
- roads, parking and associated facilities
- access to the existing intertidal area
- further development of the trail system
- good quality interpretative and education program, integrated and coordinated with similar programs for other facilities in the Central Coast area
- improvement of the Highway 101 intersection to increase visibility and ease of access

Scenario 2:

- Phase 1 development, plus
- development of the tidal area at the location of the lower quarry, including additional access, parking and interpretation in that area of the site
- additional investments for a particularly high quality interpretative facility, such as for excellent audio/visual programming, technical exhibits, educational and

other meeting space, etc.

- additional attention to marketing the facility to a regional and national audience

For both scenarios it is assumed that access to all facilities will be at no cost for the general public; some fees could be charged for special use or access, such as for guided group tours, meeting room use, or use for special events.

Market Penetration

Attendance forecasts are based on measurements of travel market penetration for comparable facilities on the Oregon Coast, adjusted to represent the relative attractiveness of each development scenario for Yaquina Head. This approach provides a clear methodology for attendance forecasts, and results in attendance forecasts for the primary locations from which Yaquina Head visitors will originate.

The market penetration findings are presented in Tables 5-1 and 5-2; these tables are based on data collected directly or indirectly from each of the comparable facilities studied. Table 5-1 defines the local and regional markets for each facility, lists the estimated 1989 population of these markets, and shows the total and school group attendance in 1989. The first line describes Yaquina Head. The following three lines describe the Hatfield Marine Science Center and Cape Perpetua facilities, both of which represent attractions in the area which do not charge an admission fee. For Cape Perpetua two perspectives are used: the entire site, and just the visitor center. This approach is chosen because 1) admission data are available only for the visitor center, and estimated for the remainder of the site, and 2) breaking the visitor center out in this manner is useful for subsequent analysis.

Table 5-1
COMPARABLE ATTRACTION MARKET AREAS AND ATTENDANCE

	Market Area Definition		Market Area Population		Attendance	
Facility	Local	Regional	Local	Regional	Total	School group
Yaquina Head	Lincoln County	Oregon	37,230	2,750	271,605	10,700
Hatfield Marine Science Center	Lincoln County	Oregon	37,230	2,750	421,546	25,940
Cape Perpetua:						
Visitor Center	Lincoln County	Oregon	37,230	2,750	89,250	1,244
Entire Site	Lincoln County	Oregon	37,230	2,750	446,000	1,244
Columbia River Maritime Museum	Clatsop County	Oregon	32,900	2,750	92,576	5,000
Sea Lion Caves	None	OR/WA		7,362	250,000	3,000

The last two lines describe the Columbia River Maritime Museum in Astoria and Sea Lion Caves, a commercial development north of Florence. Both of these facilities charge admission. Data for Sea Lion Caves is estimated in some cases.

Table 5-2 generates estimates of local and regional market penetration for each facility. The first two columns show the percent of annual non-school attendance (total attendance less attendance by organized school groups) which is local (by residents of the county in which the facility is located) or regional (by Oregon residents). These data are from facility records or are assessments by facility operators. In the case of the percent of visitation from the local area, the only data available for the non-fee facilities are from the Hatfield Marine Science Center, showing 5% during October, and the same figure is estimated by Maritime Museum staff. This figure is adjusted to better represent the entire year (the primary volume of which is during the summer, when out-of-state and Oregon travel is higher), then attributed to Cape Perpetua and Yaquina Head.

Table 5-2
MARKET PENETRATION FOR COMPARABLE FACILITIES

Facility	Nonschool Attendance Proportion Local	Nonschool Attendance Proportion Oregon	Nonschool Attendance by Market Area Local	Nonschool Attendance by Market Area Oregon	Penetration Ratio Local	Penetration Ratio Oregon	Nonstate Percent
Yaquina Head	3%	63%	7,827	164,370	210	61	34%
Hatfield Marine Science Center	3%	62%	11,868	245,276	319	90	35%
Cape Perpetua:							
Visitor Center	3%	58%	2,640	51,043	71	19	39%
Entire Site	2%	60%	8,895	266,854	239	98	38%
Columbia River Maritime Museum	5%	34%	4,379	29,776	133	11	61%
Sea Lion Caves	0%	25%	0	60,762	0	8	75%

Columns three and four show local and regional non-school attendance, calculated from columns one and two and from the attendance figures in Table 5-1. Finally, columns five and six show local and regional market penetration, measured in terms of visits per 1,000 residents of the market area. In addition the last column shows the percentage of non-school attendance which is from out-of-state; this amounts to the difference between the local and Oregon attendance and 100%.

Penetration rates are substantially larger for the local market than for the Oregon market, as one would expect. They range from about 320 visits per 1,000 local households for the Marine Science Center to about 70 visits for the Cape Perpetua visitor center. The relatively large values here relate to factors such as visits with children as part of short outings, entertainment of visiting guests, and repeated visits by individual students and retired residents of the area. These penetration values are probably somewhat high in a few cases, due to data limitations.

The regional (Oregon) market penetrations are substantially lower, representing the greater distance to most of this market and the larger number of competing attractions within Oregon. Penetrations range from 90 visitors per 1,000 population for the Marine Science Center to 61 for Yaquina Head. Both figures for Cape Perpetua should be considered approximations, although the value of 19 for the visitor center at Cape Perpetua reflects the limited volume this facility receives compared to the volume visiting the remainder of the site.

Penetrations for facilities which charge a fee are substantially lower, 11 for the Maritime Museum and 8 for Sea Lion Caves. This indicates the extent to which an admission fee limits visitor volume.

Annual Visitor Volume

Annual 1995 visitor volume forecasts for the two Yaquina Head development scenarios appear in Table 5-3. These forecasts are based on schools attendance estimates and market penetration figures from above.

Table 5-3
ANNUAL 1995 VISITOR VOLUME, BY DEVELOPMENT SCENARIO

	DEVELOPMENT SCENARIO	
	1	2
DEMAND CHARACTERISTICS:		
Penetration Rate (attendance per 1,000 population, excluding school group attendance), by market area		
Lincoln County	200	250
Oregon	65	100
Percent Nonresident Attendees	40%	50%
DEMAND FORECAST:		
School Group Attendance	15,000	20,000
Nonschool Attendance:		
Lincoln County	8,187	10,234
Oregon	189,904	292,159
Out-of-State	132,061	302,394
Total Attendance	345,152	624,787

Note: Primary assumptions are: 1) Lincoln County 1995 population of 40,937; 2) Oregon 1995 population of 2,962,531

Scenario 1

For Scenario 1, school attendance is assumed to be 15,000 students, approximately 50% greater volume that for Yaquina Head at present. Market penetration is 200 visits per 1,000 local area residents per year, and 65 visits per 1,000 Oregon residents. The local penetration rate is somewhat lower than that calculated for comparable facilities, but is chosen conservatively due to 1) the unreliability of data regarding local resident visitation, and 2) to focus on that visitation which is not simply casual, consisting of a brief visit to the site.

The regional penetration figure is somewhat higher than for Yaquina Head at present, but not as high as the Marine Science Center or the entire Cape Perpetua site. This again is a somewhat conservative choice, taking into consideration the limitations of the available attendance data. The proportion of visitors from out-of-state is 40%, somewhat greater than the existing figures for the non-fee comparable facilities.

The resulting attendance forecast is approximately 345,000 visitors per year, about 27% greater than for the site at present.

Scenario 2

The visitor volume forecast for Scenario 2 is 625,000 visitors. This forecast is based on schools attendance of 20,000 per year, local market penetration of 250 visits per 1,000 residents per year, and regional market penetration of 100 visits per 1,000 Oregon residents per year. The proportion of visitors who are from out-of-state is 50%, substantially higher than other non-fee facilities in the area but not as high as those charging admission. The increased penetration stems from the greater attractiveness and increased volume capacity of Scenario 2 development compared to Scenario 1, in particular the ability of this development to attract and satisfy a higher proportion of out-of-state visitors.

Monthly Visitor Volume

Average monthly visitor volume is forecast from the annual volume forecast for each scenario using a monthly attendance distribution estimated from selected comparable facilities. Table 5-4 shows the percent attendance distribution by month for Yaquina Head plus six other facilities for which these data are available. A monthly profile for Yaquina Head is shown in the last column, which consists of the monthly averages for Yaquina Head at present, the Marine Science Center, Cape Perpetua, and the Maritime Museum. The other facilities were not included in the calculation because they were not suitably comparable to the intended development at Yaquina Head, and/or their attendance data are not reliable.

For purposes of further calculations the peak month at Yaquina Head is August, during which will occur 17.4% of annual visitation. July visitation will be nearly as great, with 17.0% of the annual total. Although the actual monthly attendance may deviate from this pattern once development is complete, these figures are suitable for purposes of projecting daily attendance.

Table 5-4
DISTRIBUTION OF ANNUAL VISITATION
FOR YAQUINA HEAD COMPARABLES

Month	Yaquina Head	HMSC	Cape Perpetua	Dunes NRA	Devil's Punchbowl	Devil's Elbow	Maritime Museum	Yaquina Head Projection
Jan	4.4%	4.6%	1.7%	1.8%	6.7%	4.2%	3.3%	3.64
Feb	3.6%	3.7%	1.3%	1.6%	5.8%	3.2%	4.6%	3.28
March	6.6%	8.9%	2.0%	4.5%	11.0%	6.3%	6.5%	6.06
April	7.9%	7.5%	0.9%	5.7%	5.6%	7.6%	8.5%	6.48
May	10.0%	8.2%	5.7%	7.8%	2.6%	9.3%	8.9%	8.42
June	11.4%	10.8%	15.8%	13.2%	9.5%	10.5%	10.0%	11.70
July	16.1%	16.0%	19.9%	20.8%	11.7%	17.4%	16.0%	17.08
Aug	14.7%	16.3%	21.3%	23.0%	9.2%	15.4%	19.3%	17.40
Sept	10.1%	8.3%	17.5%	13.7%	12.0%	11.2%	10.1%	11.44
Oct	6.8%	6.2%	10.0%	3.8%	10.3%	6.8%	6.3%	7.22
Nov	4.4%	4.8%	2.2%	1.9%	8.5%	4.0%	3.6%	3.80
Dec	4.0%	4.7%	1.7%	2.2%	7.1%	4.1%	2.9%	3.48
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Annual Visit		421,546	89,250	21,786	317,276	341,322	92,576	NA

Daily Visitor Volume

A forecast of average daily visitor volume for the peak month is prepared in order to guide facility development and design. A forecast for the design day also is included. These forecasts are based on the annual volume forecast for each scenario, the peak month distribution, plus several other factors describing the distribution of visitation between weekends and week days. The procedure appears in Table 5-5. The pertinent factors for this calculation are:

- o 4-hour peak period
- o 60% of daily attendance during peak period
- o average length of stay on site of 1.5 hours

Table 5-5
DAILY VISITOR VOLUME PROJECTION
YAQUINA HEAD, 1995

	Scenario 1	Scenario 2
Annual Visitation	345,000	625,000
August (Peak) Visitation (17.4%)	60,030	108,750
Peak Period Daily Visitation		
Weekday (60%)	1,630	2,953
Weekend (40%)	2,765	5,008
Peak Day On Site Crowd	622	1,127
Visitor Center Attendance, by percent of all on site visitors at center		
70%	435	789
50%	311	563
30%	187	338
Associated # Vehicles	207	376
Design Day Attendance (1.3 x Average Peak)	809	1,465
Visitor Center Attendance, by percept of all on site visitors at center		
70%	566	1,025
50%	404	732
30%	243	439
Associated # Vehicles	270	488

Average daily volume for a peak month week day is 1,630 visitors for Scenario 1, and 2,953 for Scenario 2. This is based on 40% of monthly attendance occurring on weekends. The associated weekend day average volumes are 2,765 and 5,008, respectively.

The on site crowd for a peak month weekend day is 622 visitors for Scenario 1, and 1,127 visitors for Scenario 2. The on site crowd for the design day, taken as 1.3 times the average peak day, is 809 for Scenario 1 and 1,465 for Scenario 2.

The number of on site vehicles at the peak period for the design day is 270 for Scenario 1 and 488 for Scenario 2, assuming 3 persons per vehicle.

Visitor Center Attendance

Attendance at the visitor center will represent only a portion of total site attendance, particularly if an admission fee is charged. This section forecasts visitor center peak and design day attendance separately for the fee and non-fee situation.

No Admission Fee

If a fee is not charged, and half of peak period visitors are at the visitor center, average peak period (August) crowd at the visitor center would be 311 visitors for Scenario 1 and 563 visitors for Scenario 2; the corresponding design day figures are 404 and 732 visitors. Other peak crowd figures appear in Table 5-5 to represent other visitor "shares" for the visitor center.

Admission Fee

If a modest admission fee is charged for the visitor center, total and peak visitor volume would be substantially lower. The market penetration of such a visitor facility would be approximately the same as existing for-fee facilities, about 70 local area visitors per 1,000 local area residents, and about 15 visitors per year per 1,000 Oregon residents. The facility, however, could expect to draw a relatively high percentage of its visitors from out-of-state; 65% is used for this analysis.

Based on these figures, annual visitor center attendance would be about 145,000 visitors, as shown in Table 5-6. The procedure used to prepare this attendance figure is the same as used previously to project total site attendance.

It is evident that imposing an admission fee would cut visitor center attendance substantially, although the facility would still remain one of the more popular attractions on the Oregon coast.

Table 5-6
VISITOR CENTER ANNUAL ATTENDANCE, FEE ADMISSION

	Visitor Center: Fee Admission
DEMAND CHARACTERISTICS:	
Penetration Rate (attendance per 1,000 market area population, excluding organized school groups), by market area	
Lincoln County	70
Oregon	15
Percent Nonresidents	65%
DEMAND FORECAST:	
School Group Attendance	10,000
Nonschool Attendance:	
Lincoln County	2,866
Oregon	43,824
Out-of-State	86,709
Total	143,399

Note: Primary assumptions are 1) Lincoln County 1995 population of 40,937, 2) Oregon 1995 population of 2,962,531.

Annual attendance at this level would be associated with an average peak day crowd in the visitor center of 261, and a design day crowd of 340, as shown in Table 5-7.

Table 5-7
VISITOR CENTER PEAK VOLUME, FEE ADMISSION

	Visitor Center, Fee Admission
Annual Attendance	145,000
Peak Day (August) Attendance (17.4%)	25,230
Daily Attendance Distribution	
Weekday (60%)	685
Weekend (40%)	1,162
Average Peak On Site Crowd (visitor center only)	261
Design Day On Site Crowd (1.3 x Av. Peak)	340

6. VISITATION-RELATED ECONOMIC IMPACTS

This chapter describes the economic benefits which are associated with attendance at Yaquina Head. Off-site benefits include visitor expenditures in local businesses, the associated payroll and employment in these benefits, plus local tax revenue generated by these expenditures. On-site benefits consist of the employment and payroll of staff at Yaquina Head.

Off-site Economic Benefits

To the extent that Yaquina Head attracts and retains visitors in the Central Coast area it will generate substantial economic benefits for local businesses and residents. The greatest benefits occur when the facility attracts visitors (or is a substantial part of an "attractions package" which draws such visitors) who otherwise would not come to the area. Examples of such visitors would be educators, students or others who participate in an educational program which involves Yaquina Head, or winter visitors drawn to the area because of particularly good storm-watching opportunities at the center. Data from the Centrac 1985 study indicate that approximately 15% of Yaquina Head visitors are destined primarily to Yaquina Head.

Findings from the profile of Central Coast visitors prepared for this study are consistent with this picture. These data show that approximately a quarter of Central Coast visitors are bound primarily to the area and make no other stops. Oregon residents are particularly likely to target the Central Coast in this manner. Given that a portion of the visitors who target the Central Coast visit more than one coastal destination during their trip, the portion of Yaquina Head visitors who visit only this destination would range between 15% to 20% of all visitors.

Sizable benefits also accrue when Yaquina Head serves as one portion of a visitor's daily itinerary, and in so doing retains the person in the area and increases their tendency to make purchases and/or to stay overnight. Findings from the Centrac study indicate that about three in five visitors had Yaquina Head as one of several planned stops, and another one in five made an unplanned stop there. The more recent Central Coast travel profile findings are consistent with this finding, although they indicate a somewhat more prevalent pattern of multiple trip destinations. These data show that one in five travelers have two or three planned destinations, and about half have "many destinations."

In summary it appears likely that Yaquina Head will serve as a primary destination for up to 20% of its visitors, but remain one of several destinations in the Central Coast for approximately four out of five visitors. Accordingly the economic impact analysis must take into consideration the "sharing" of the visitor economic benefits with other attractions in the area.

Scenario 1

A total of $39.2 million per year in off-site expenditures will be generated by visitors to the Yaquina Head facility, assuming Scenario 1 development. These expenditures, which are shown in 1989 dollars, will be in restaurants, retail stores, gas stations and other businesses in the Central Coast area. The procedure for generating this figure appears in Table 6-1. In general the procedure calculates the number of Yaquina Head visitors for each type of travel accommodation, multiplies this number by the average expenditure of each visitor, then adjusts this amount to represent the portion which is attributable to the Yaquina Head visit.

First, the distribution of travelers by type of accommodation appears in column 1. This proportion is multiplied by the annual visitor projection (340,000) to calculate the number of projected visitors for each type of accommodation. The average daily expenditure per visitor party for each type of visitor accommodation appears in column 3, followed by the average party size in column 4. These data are from the 1988 study of Central Coast visitors; the expenditures have been corrected to represent 1989 dollars.

Table 6-1
YAQUINA HEAD OFF-SITE ECONOMIC IMPACT
Scenario 1

Traveler Accommodation	Proportion of Visitors	Visitors/ Year	Av. Expend. ($/Party/Day)	Av. Party Size	Prop'n Attrib. to Yaq. Head	Total off-site Economic Impact (000$)
Hotel/Motel/B&B	.25	86,250	160	3	.28	16,429
Friends/Relatives	.04	13,800	86	3	.28	1,413
Campground	.21	72,450	78	3	.28	6,728
Day Visitors	.50	172,500	74	3	.28	15,196
All Yaquina Head Visitors	1.00	345,000				39,766

Finally, column 5 shows the proportion of each visitor's expenditures which is attributable to the Yaquina Head visit. The adjustment factor (0.28) is calculated assuming 1) 15% of visitors are bound solely to Yaquina Head, 50% visit two or three sites, including Yaquina Head, and 35% visit an average of five sites, including Yaquina Head, and 2) in general two-thirds of a visitor's trip itinerary relates to recreational attractions, with the other third is taken up with shopping, eating, commercial entertainment, etc.

The use of this adjustment factor helps compensate for "multiple counting" in that only a portion of the expenditures (about a quarter in this case) made by those visiting Yaquina Head are associated with the facility. These findings do not establish a causal link between Yaquina Head and these visitor expenditures, however: Yaquina Head, serving as a visitor attraction, is only one factor in a typical traveler's decision to travel and make purchases. The impact figures are very useful, however, for establishing the magnitude of the economic linkage between expansion of Yaquina Head and the associated increases in visitor volume on the Central Coast.

Comparison With Current Impacts

The portion of the Scenario 1 impact figure which relates to the expansion and improvement of the existing Yaquina Head facility is the difference between the Scenario 1 impact amount and a comparable impact amount which represents Yaquina Head today. This calculation appears in Table 6–2, which yields an annual visitor expenditure of $26.9 million. The procedure and figures for calculating this impact figure are identical to those used for the Scenario 1 analysis except 1) the visitor volume, and 2) the average party size (where the current conditions analysis uses the party size used by the BLM to convert automobile counts to visitor counts.)

Table 6–2
YAQUINA HEAD OFF–SITE ECONOMIC IMPACT
Existing Conditions

Traveler Accommodation	Proportion of Visitors	Visitors/ Year	Av. Expend. ($/Party/ Day)	Av. Party Size.	Prop'n Attrib. to Yaq. Head	Total off–site Economic Impact (000$)
Hotel/Motel/B&B	.25	68,000	160	3.5	.28	11,102
Friends/Relatives	.04	10,880	86	3.5	.28	955
Campground	.21	57,120	78	3.5	.28	4,546
Day Visitors	.50	136,000	74	3.5	.28	10,269
All Yaquina Head Visitors	1.00	272,000				26,872

The difference between Scenario 1 expenditures and current expenditures amounts to $12.3 million, which represents the additional expenditures on the Central Coast which will be associated with the increased visitor volume related to Scenario 1 development.

Scenario 2

Analyzing Scenario 2 in a comparable manner, which appears in Table 6–3, yields a visitor expenditure estimate of $71.5 million. The difference between this amount and current expenditures is $44.6 million, which represents the net new expenditures which will be associated with increased visitor volumes related to Scenario 2 development.

Table 6–3
YAQUINA HEAD OFF–SITE ECONOMIC IMPACT
Scenario 2

Traveler Accommodation	Proportion of Visitors	Visitors/ Year	Av. Expend. ($/Party/ Day)	Av. Party Size	Prop'n Attrib. to Yaq. Head	Total off–site Economic Impact (000$)
Hotel/Motel/B&B	.25	156,250	160	3	.28	29,762
Friends/Relatives	.04	25,000	86	3	.28	2,560
Campground	.21	131,250	78	3	.28	12,188
Day Visitors	.50	312,500	74	3	.28	27,530
All Yaquina Head Visitors	1.00	625,000				72,040

The findings regarding visitor expenditures are summarized in Table 6–4, which also shows payroll, employment and local tax receipt impacts. Expenditures are in the first column, showing current conditions, expenditures for each development scenario, and the difference (net) with the former.

Table 6–4
ECONOMIC IMPACT SUMMARY, BY DEVELOPMENT SCENARIO

Development Scenario	Expenditures ($ millions)	Payroll ($ millions)	Employment (jobs)	Local Tax Receipts ($000)
Current Conditions	26.9	4.8	514	282
Scenario 1	39.8	7.1	760	417
Scenario 1 Net Impact	12.9	2.3	246	135
Scenario 2	72.0	13.0	1,386	762
Scenario 2 Net Impact	45.1	8.2	872	480

Other economic impacts are calculated assuming that the relationship between each and visitor expenditures is the same as for Lincoln County, as reported in the 1988 study of Oregon travel impacts (Dean Runyan Associates, 1990). Payroll and employment figures represent both full and part time positions. Local tax payments consist of room tax receipts.

On-site Economic Benefits

Additional benefits derive from the salaries of Yaquina Head employees, and from other purchases made in order to operate the facility. Estimates of these impacts are based on a preliminary staffing and budget outline for the facility, as prepared by BLM staff.

Staffing is anticipated to be 11 full-time people, plus seasonal and volunteer staff as necessary. The preliminary budget for the full-time staff is $303,000 per year, including benefits.

Although an operating budget for the facility is not available at this stage it is likely that operating costs -- consisting in part of purchases for materials and supplies from local businesses -- would amount to at least $50,000 per year.

Revenue collected from an admission fee would total $359,000 thousand per year, based on annual attendance of 145,000 and the following assumptions:

- 60% adult, $3.00 admission
- 15% senior, $2.50 admission
- 20% youth, $1.50 admission
- 5% under 6, complementary pass, etc.

7. FINDINGS AND RECOMMENDATIONS

This chapter reviews the primary findings of the report and presents a series of recommendations pertaining to further development at Yaquina Head.

Primary Findings

1) **Yaquina Head has the potential to become a major regional and national marine attraction, if developed appropriately.**

Yaquina Head represents nearly all of the high quality features of the Oregon coast, including terrain, wildlife (both marine and terrestrial), views, and ready access. The Yaquina Head strengths lie particularly in its high quality tidal pool, use as a viewing station owing to its penetration into the ocean environment, and its operating lighthouse. It lacks only a beach, although others are nearby. The proximity to urban travel services and other attractions in Newport makes Yaquina Head a good component in a Central Coast regional "package" of high quality educational and recreational attractions.

Although the Yaquina Head facility can provide good access to high quality coastal resources, other coastal locations also serve the same function. In order to merit the particular attention of travelers on the Oregon coast, as well as educational and other groups in Oregon, it will need exceptionally good development for access and interpretation.

2) **Demand for access to good quality natural resources on the Oregon coast is growing.**

Peak season visitation at Yaquina Head increased at an average annual rate of 9.6% from 1985 through 1989. Similarly, since the 1982/83 recession, traffic counts on Highway 101 show steadily increasing volumes past the Yaquina Head access road, and other indications of travel and recreation in the area show steady increases.

3) **Yaquina Head will be one of several destinations for a large majority of its visitors.**

Most Yaquina Head visitors will stay on site for less than two hours, and will partake in other educational, recreational and commercial attractions in the area.

Oregon Coast visitors who are oriented to viewing or studying wildlife show higher than average participation rates in a range of activities, including in particular hiking, picnicking, visiting museums and historic sites, attending art/cultural events, fairs/festivals, and shopping in small communities.

4) **Yaquina Head visitors will vary substantially in age, education and income, but a relatively large proportion will be well educated.**

Travelers who are interested in wildlife tend to be well educated. This is particularly so for travelers from out-of-state: nonresident visitors generally have higher income and education levels than Oregon resident travelers.

5) **Visibility and accessibility are crucial to achieving good visitor volume; the current approach and access need considerable attention.**

Visibility and access from Highway 101 are poor, and the current impression one gets upon approaching the site is not consistent with the site's development potential.

6) **The anticipated visitor volumes at buildout are probably well beyond the capacity of the tidepool area without extensive alteration or damage.**

Additional development at Yaquina Head could generate a large increase in demand for access to the site's tidal areas. It is unlikely that such increased use will be consistent with preservation needs for these resources.

7) **Off site economic impacts are substantially larger than economic impacts stemming directly from facility operations.**

Although economic benefits on site, such as employment, will stem from further development at Yaquina Head, the largest portion of such benefits will be due to Yaquina Head visitor expenditures among businesses in the Newport and Central Coast area.

8) **Imposing an admission fee for the visitor center will reduce admissions to about one-third those of a free facility.**

Visitor volume would be high for a free-admission facility, due in part to relatively casual visits by those traveling on the coast. Charging an admission fee leads to a visitor mix more representative of out of state and higher income travelers.

Recommendations

The following are specific recommendations which are based on the findings of this study and on other experience of the project team. In addition, the findings of the visitor volume analysis in Chapter 5 are intended as input to the project design phase but are not discussed further in terms of recommendations.

Pursue opportunities for regional attractions coordination

There are a number of good opportunities to integrate the Yaquina Head facility with other facilities and attractions in the Central Coast area to form a an attractions network. Such a network, if managed and marketed in an integrated manner, can provide for increased regional and national attention, enhancing the draw for all facilities included. The primary participants in such a network include:

- Hatfield Marine Science Center
- Oregon Coast Aquarium
- Otter Rock Marine Gardens at Devils's Punchbowl State Park
- accommodations and other commercial offerings of Newport, Lincoln City and other nearby communities

The role of the Yaquina Head facility would focus on outdoor natural resource interpretation. It would provide immediate, "hands on" (or at least close proximity) access to tidal resources, wildlife viewing opportunities, and a view of early navigation on the Oregon coast.

Achieve the highest quality possible for any facility construction, interpretation and programming.

Yaquina Head can become one of the "must see" attractions of the Oregon coast, and can gain regional and national attention as an interpretive site. To do so it must be developed with this objective in mind. Facility design and construction should be to the standards of other regional and national attractions. Interpretation should include components which address regional and national issues, such as coastal management, wildlife protection, history of navigation and commerce, management of international waters, and other issues that extent (at least to some extent) beyond Yaquina Head and Oregon.

Facility size and design should be appropriate to the site. Separating functions into two or more buildings should be considered if a desirable visitor facility site is inappropriate for a building which also include administrative or other space. While the building(s) should not dominate the visitors experience, they should serve to frame and/or symbolically represent the quality of the site and its resources.

Investigate comparable resource management, educational and interpretative projects nationally prior to embarking on final site, facility and interpretive design.

Assuring that Yaquina Head can take its place as part of a regional and national network of interpretative facilities will require additional, detailed information on options and standards for site design, building design, and other aspects of facility development. This information should be gathered prior to the design phase, or as a first step of the design process.

Assure that land use at the junction of Highway 101 and the entrance road is the highest quality possible.

The Highway 101 junction currently is poorly developed for traffic access, is not a visual asset. Moreover the potential exists for substantial commercial land use which could markedly "frame" the entrance to the facility. The BLM should move as quickly as possible to assure that this intersection is a fitting entrance to one of the largest attractions on the coast. This could be done through cooperation with local jurisdictions, by working with state and federal highway authorities, and/or through acquisition of the land at the intersection. Allowing undesirable development of the entrance area may effectively foreclose many options for a particularly good quality and well attended facility

Develop the lower quarry into a unique, accessible tidal area which can provide a high quality educational experience for a large volume of visitors.

The current tidal area will be seriously degraded by any substantial increase in use. In order to provide a satisfying experience for the volume of visitors anticipated, a new tidal area should be developed which is specifically designed to handle a large volume of visitors. This would be done by integrating a rock walkway through the facility, spacing tidepools to be visible but not accessible, and through other aspects of design.

Consider locating the interpretative center close to or immediately above the lower quarry area so that direct access via a stairway (perhaps covered) could be provided.

If possible, retain only pedestrian access to the lower quarry area in order to present the resource in as natural a manner as possible. If parking is required, keep the scale as small as possible.

Market Yaquina Head through a variety of local travel information sources, as well as regionally and nationally.

Local information sources used by travelers include their place of accommodation (including public and commercial campgrounds), visitor centers and chambers of commerce, other attractions, and government offices. Yaquina Head should be one of several complementary facilities which are packaged for purposes of such marketing.

Yaquina Head should also be make readily available through state–operated visitor centers and other sources of visitor information, and through listings in as many travel guides as possible, including commercial sources such as those published by the American Automobile Club and by various recreational vehicle publications. The facility also should appear on all Oregon state maps, and be listed in any regional and national listings of comparable facilities.

Integrate Yaquina Head activities with special community events/festivals and artistic and other resources.

The profile of visitors likely to visit Yaquina Head indicates that these people are interested in a range of activities, including art and cultural events, and fairs and festivals. Particularly in the "shoulder" or off season, the Yaquina Head visitors center could boost attendance by hosting art exhibitions, poetry readings, wine tastings, etc. with marine or coastal themes. These events would ideally be marketed to Oregon residents traveling to the central coast for the weekend. This type of special event could easily be coordinated with community activities such as the Newport winter seafood and wine festival, and the new fall festival. If this type of activity is envisioned for Yaquina Head the visitor facility should include the appropriate meeting, gallery and other space, including space for outdoor gatherings.

Consider as many aspects of revenue generation as possible in order to reduce net facility operating costs.

Revenue generating options include meetings and other facility rentals, food service, concessions for guided tours and tour bus visits, retail sales, educational programs for a fee, and others.

If an admission fee is charged, design facilities so that important visitor services are available to those who do not pay the fee.

Obvious examples are restrooms and interpretative information. Other sections that should remain accessible are any retail or food service facilities and access to fishing and at least some other tidal areas.

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